

# Surveys that work

An introduction to  
using survey methods

Caroline Jarrett  
@cjforms

2016 #surveysthatwork



Let's find out about our experience

# Fill in this questionnaire

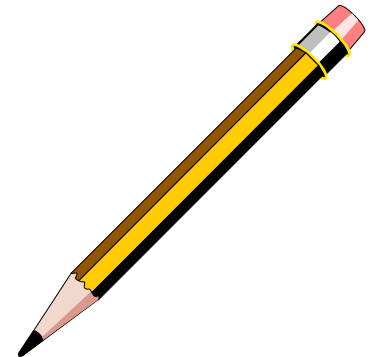
1. How many surveys have you run?

NONE    1 to 5    6 to 10    more than 10

2. What is your top tip for a better survey, based on experience of writing or answering?

---

---



Now work in pairs

# Try this as an interview

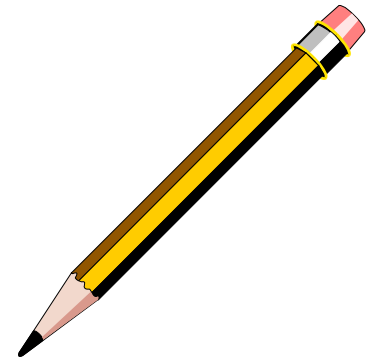
1. How many surveys have you run?

NONE    1 to 5    6 to 10    more than 10

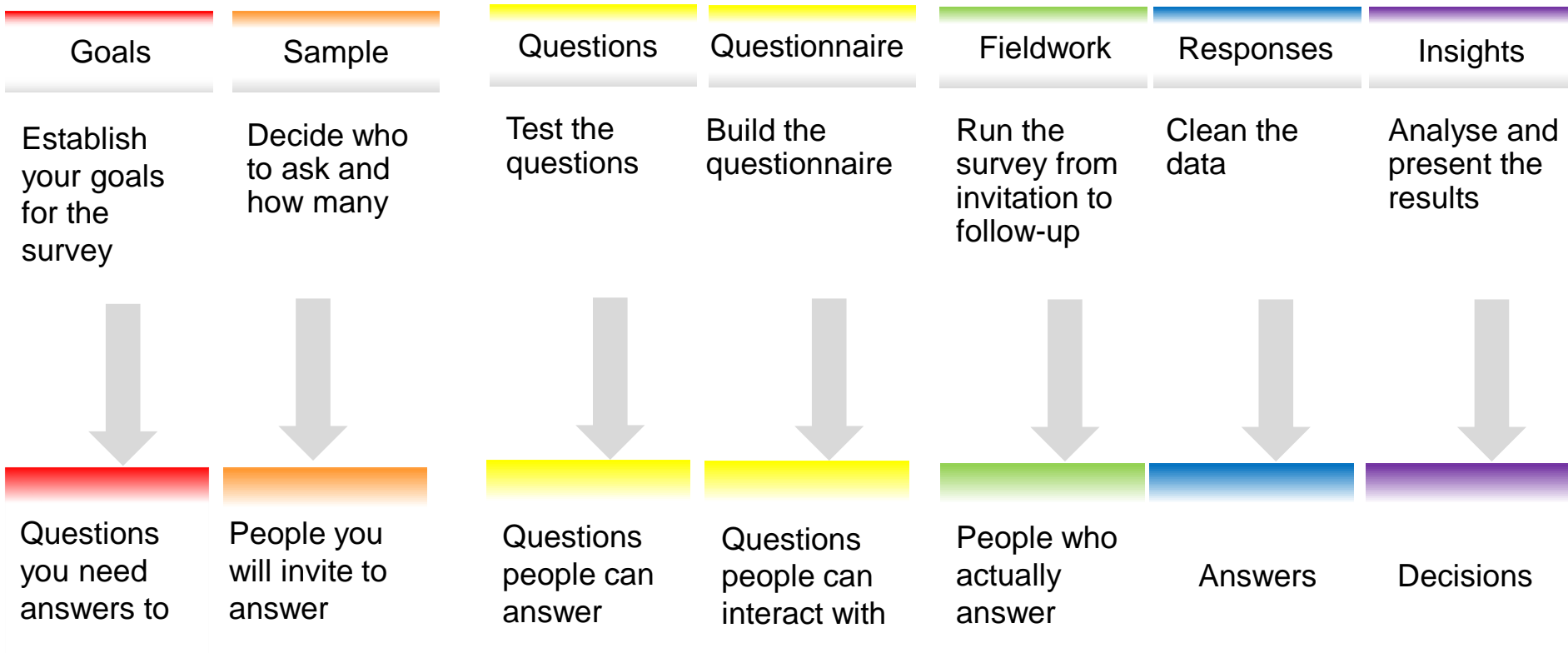
2. What is your top tip for a better survey, based on experience of writing or answering?

---

---



# The survey process



# Agenda

## Introductions

Goals

Sample

## Break

Questions

Questionnaire

## Lunch

Fieldwork

## Break

Responses

Insights

## Finish

The survey is a systematic method for gathering information from (a sample of) entities for the purpose of constructing quantitative descriptors of the attributes of the larger population of which the entities are members.

Groves, Robert M.; Fowler, Floyd J.; Couper, Mick P.; Lepkowski, James M.; Singer, Eleanor & Tourangeau, Roger (2004). *Survey methodology*. Hoboken, NJ: John Wiley & Sons.



The survey is a  
**process**  
for gathering information from  
(a sample of) entities  
for the purpose of  
constructing quantitative descriptors  
of the attributes of the larger population  
of which the entities are members.

The survey is a  
process  
for **getting answers to questions** from  
(a sample of) entities  
for the purpose of  
constructing quantitative descriptors  
of the attributes of the larger population  
of which the entities are members.

The survey is a  
process  
for getting answers to questions from  
(a sample of) people  
for the purpose of  
constructing quantitative descriptors  
of the attributes of the larger population  
of which the entities are members.

The survey is a  
process  
for getting answers to questions from  
(a sample of) people  
for the purpose of  
getting numbers  
of the attributes of the larger population  
of which the entities are members.

The survey is a  
process  
for getting answers to questions from  
(a sample of) people  
for the purpose of  
getting numbers  
that you can use to make decisions

To make decisions

People

The survey is a  
process for getting  
answers to questions

getting numbers

The aim of a survey is to get a number that helps you to make a decision

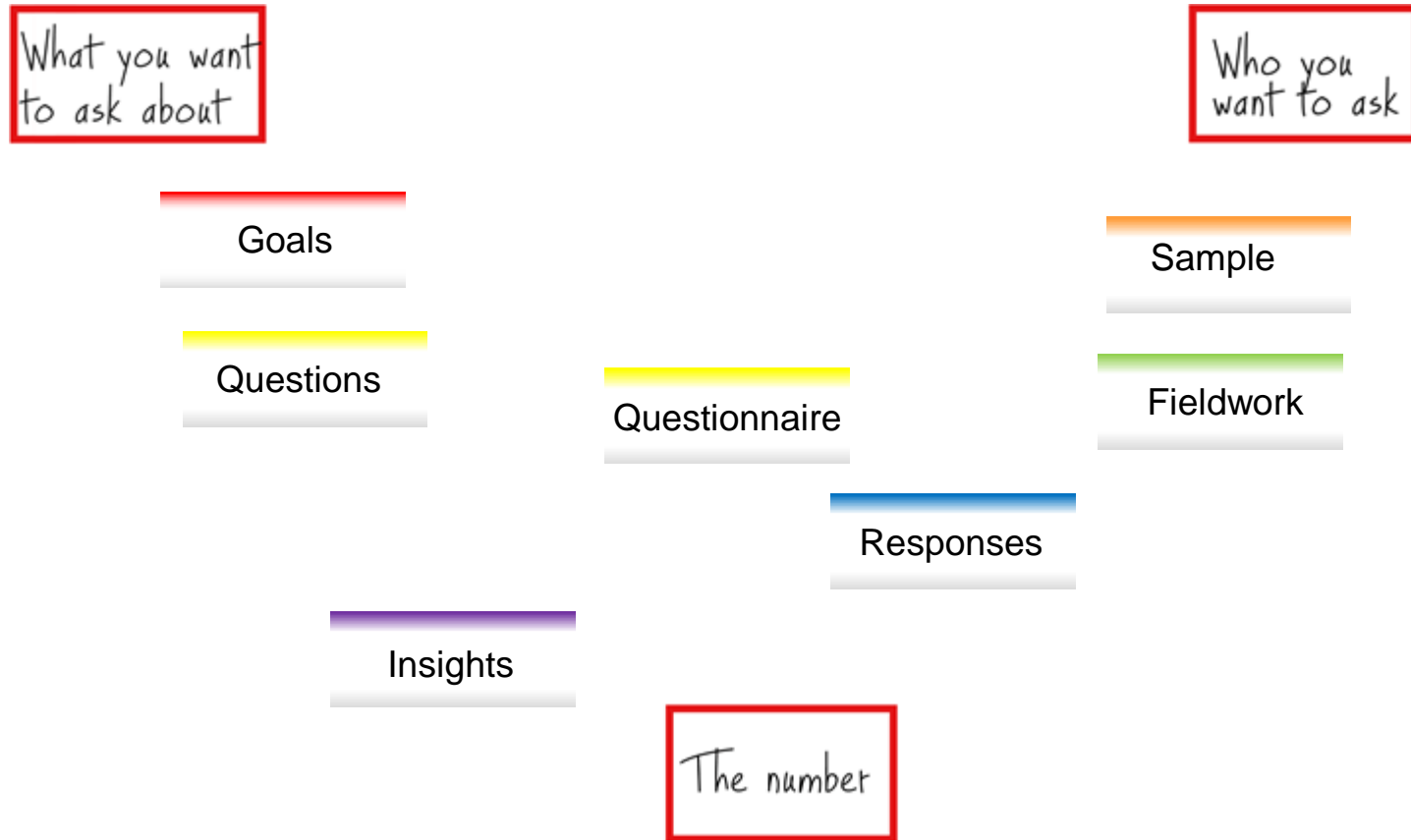
What you want to ask about

Who you want to ask

Survey

The number

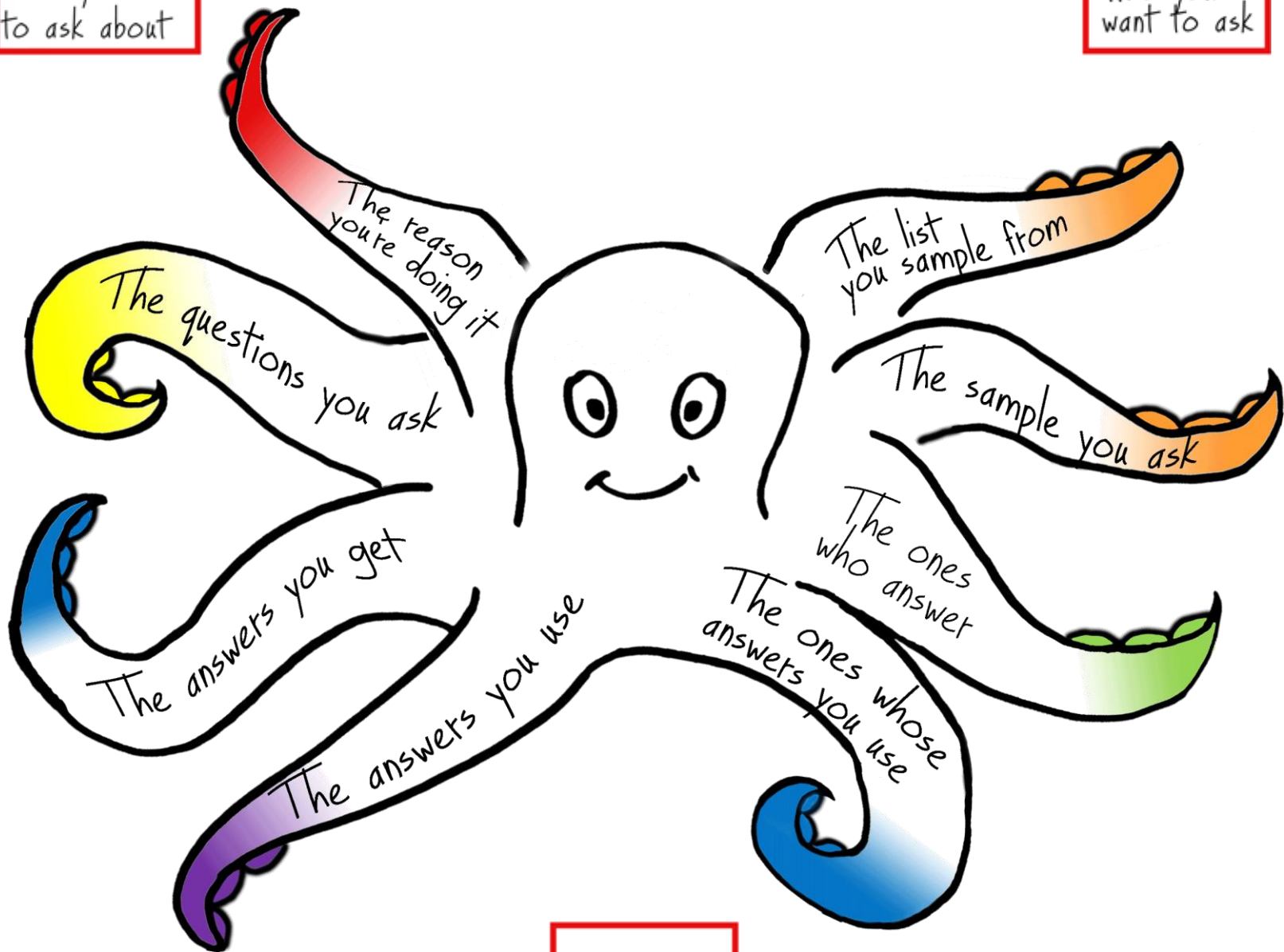
# The aim of a survey is to get a number that helps you to make a decision





What you want to ask about

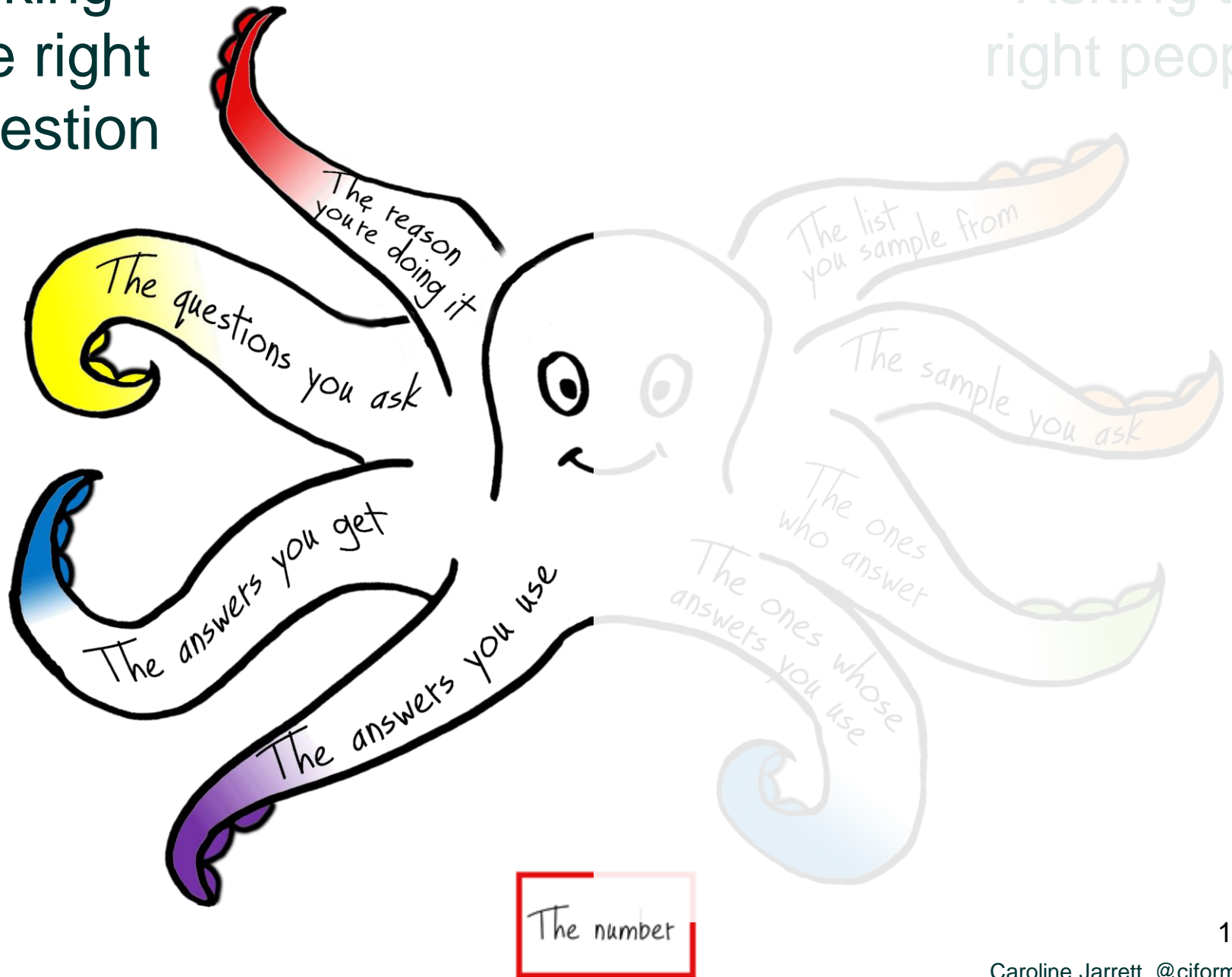
Who you want to ask



The number

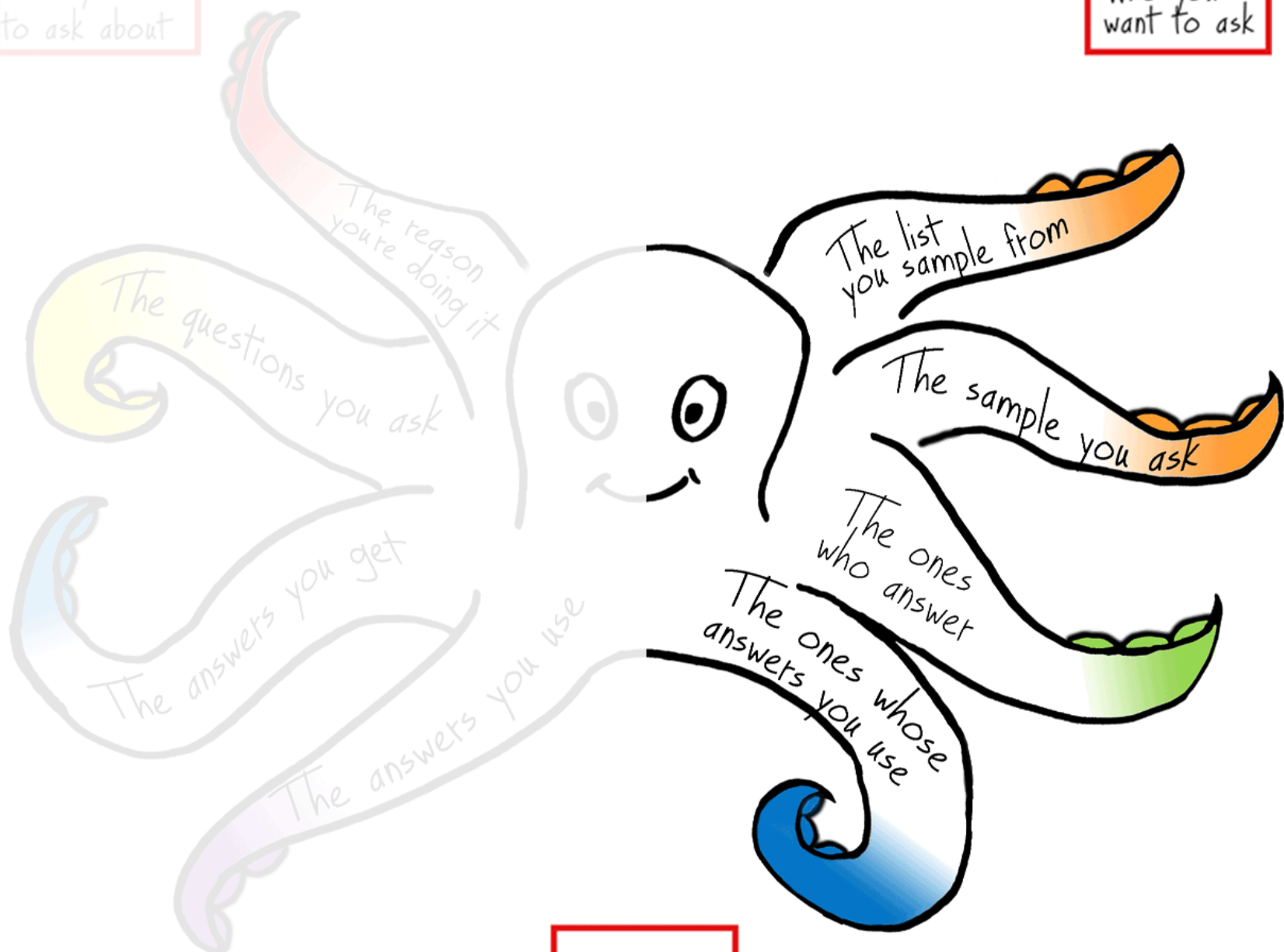
# Asking the right question

# Asking the right people



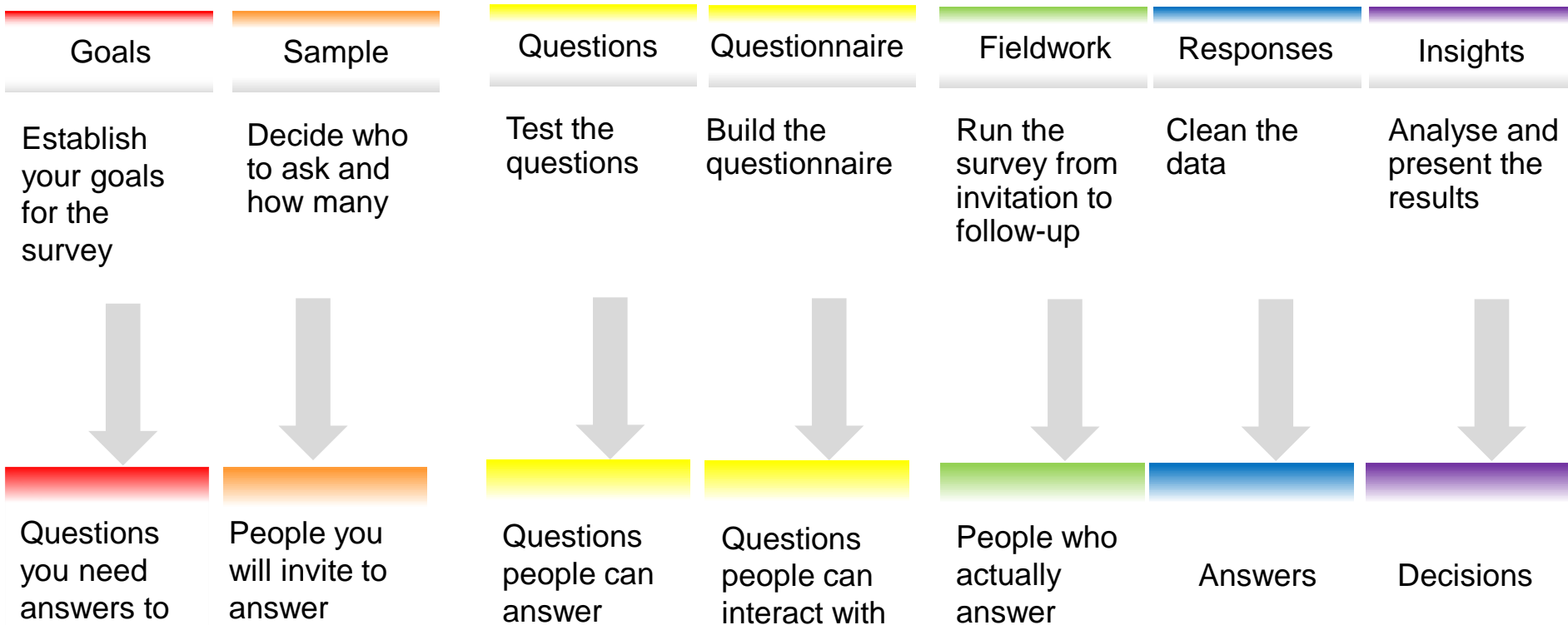
What you want to ask about

Who you want to ask



The number

# The survey process



# Agenda

Introductions

Goals and sample

Questions and questionnaire

12:30 Lunch

Fieldwork

Responses and Insights

16:30 Finish

# The survey process

## Goals

Establish  
your goals  
for the  
survey



Questions  
you need  
answers to



Mac

iPad

iPhone

Watch

TV

Music

Support



# We want to hear from you.

We would appreciate feedback on your experience at the Apple Store so we can make your next visit even better. Five minutes is all we need.

[Get Started](#)

# Establish your goals for the research

What do you want to know?



# Establish your goals for the research

What do you want to know?



Why do you want to know?

# Establish your goals for the research

What do you want to know?



Why do you want to know?



What decisions will you make based on these answers?

# What are Apple's goals for the survey?

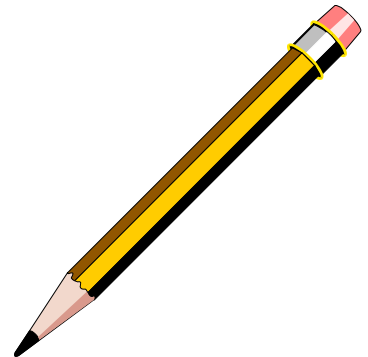
What do they want to know?

Why do they want to know it?

What decisions will they make as a result of the survey?

We want to hear  
from you.

We would appreciate feedback on your experience at the Apple Store so we can make your next visit even better. Five minutes is all we need.





# 1950s mindset: “Ask Everything”

Survey =  
Big Honkin' Survey



# 2016 mindset: the Light Touch survey

- Choose ONE question
- Find ONE person
- Ask the question, face-to-face
- See if you can make ONE decision
- Improve, iterate, increase



# This one-box survey asks one open question

Goals

**SUTTONS SEEDS**  
Est. 1806

0844 922 2899  
(Customer Services)  
8.30am to 5pm, Mon to Fri

0844 922 0606  
(Orders only)  
24hrs a day, 7 days a week

Plant Despatch Schedule

Sign In / Register | My Account

1 item **£1.45**

View Basket

Enter Search Here **Go**

Home | Vegetables | Flowers | Garden Equipment | Fruit | Perennial Plants | Special Offers | Garden Advice and Help

Home » Gardening » Vegetables » New Vegetables for 2012 » Brussels Sprout Continuity Collection

## Brussels Sprout Continuity Collection

Code: 216121

**Harvest October-February**

Collection contains 18 plants (6 of each variety): **Nautic** (a vigorous, high-yielding early variety with good standing)

Pack of 18 Plug Plants (6 of each variety)

Quantity: - 1 +

**Add to Basket** **£6.99**

Add to wish list

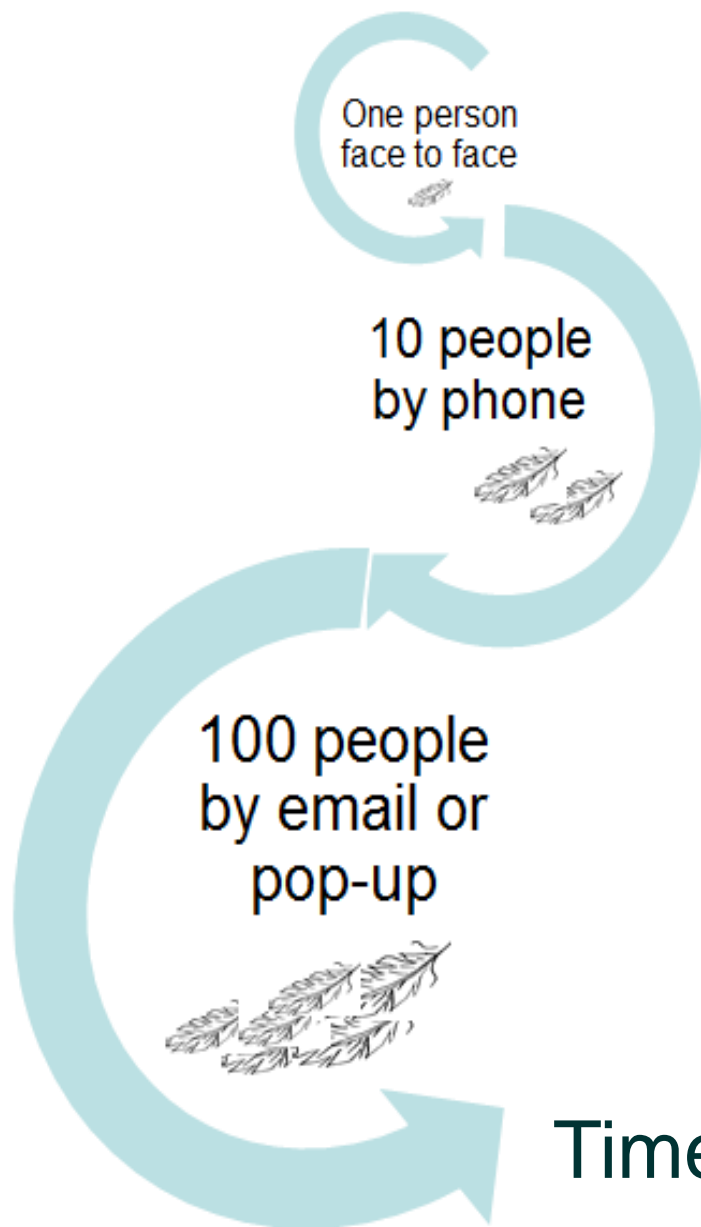
to grow your own. Even the smallest patio or that will give you a bumper crop of delicious fresh

**Help us improve**

We value your opinion.  
What do you like about our site and what can we improve on?

Click here to type...

**SUBMIT**



One way to  
iterate,  
improve,  
increase

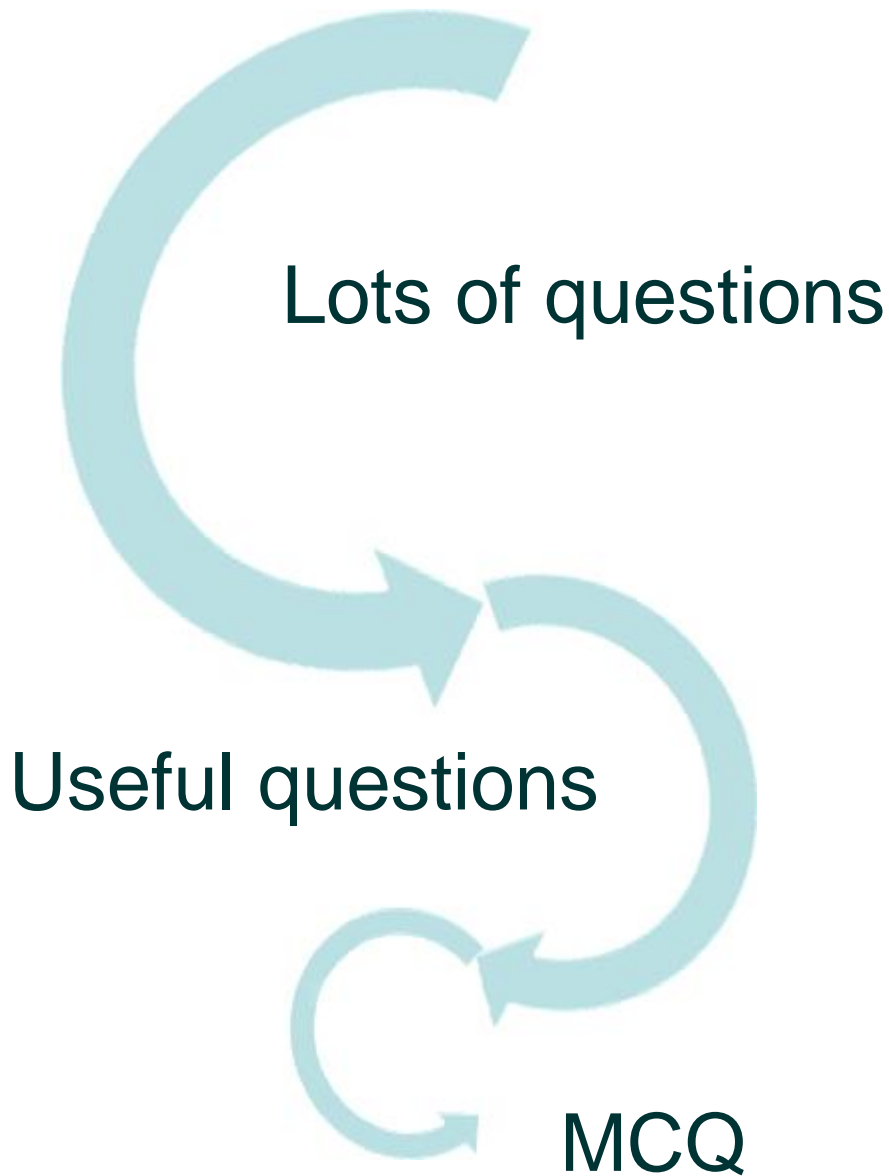
Time for new question



# What's the Most Crucial Question?

- We want to ask the fewest questions that will help us to make the decision so we need to know which are the most useful questions
- Even better: know the specific Most Crucial Question
- A Most Crucial Question has a numeric answer





Another way:  
narrow down

# The survey process

## Goals

Establish your goals for the survey



Questions you need answers to

## Sample

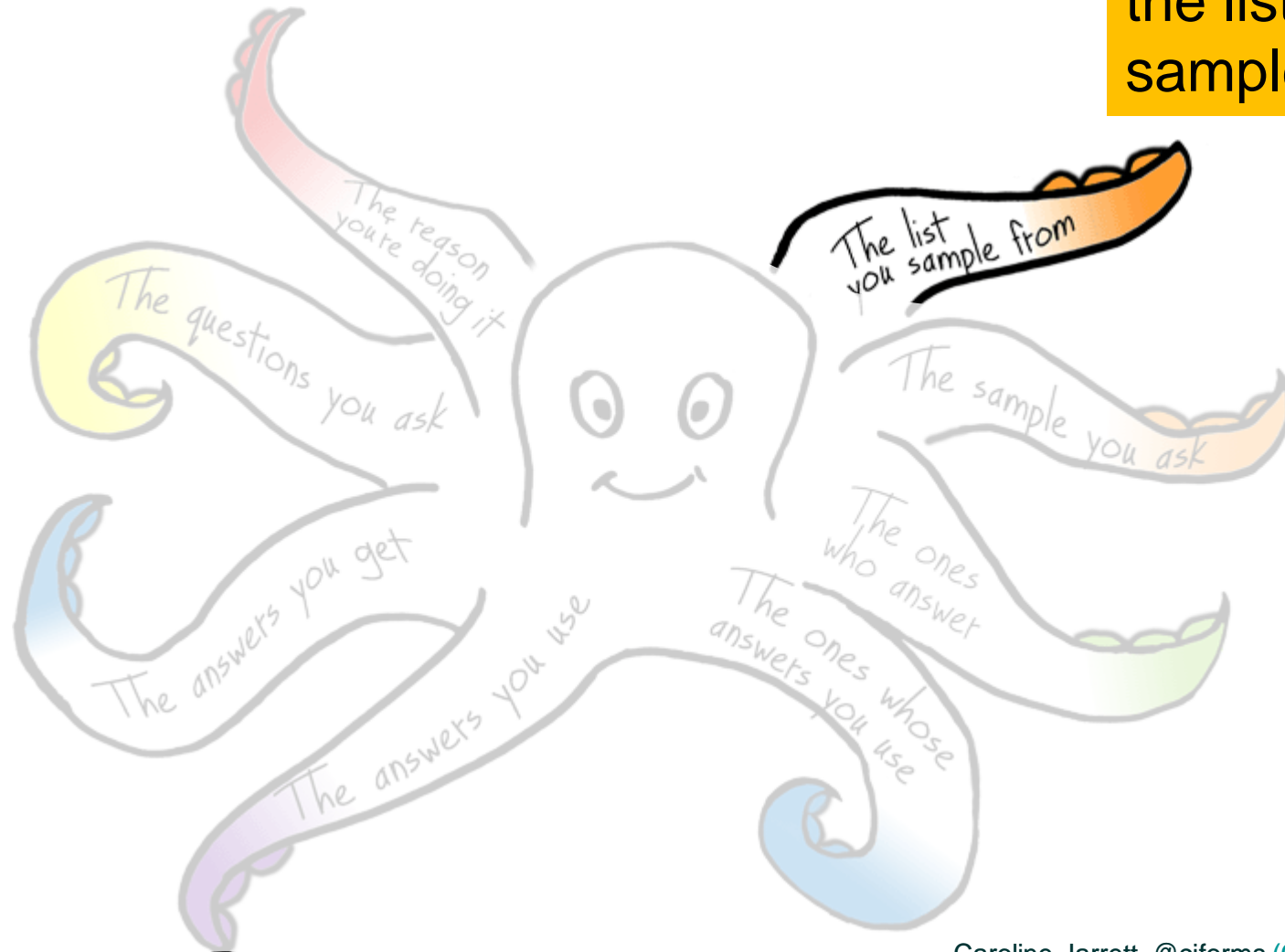
Decide who to ask and how many



People you will invite to answer

# Asking the right people is better than asking lots of people

Sample:  
the list you  
sample from



# Choose a good list



Coverage error:  
Mismatch between the people you  
want to ask and the list you  
choose to sample from

# Prank leaves Justin Bieber facing tour of North Korea

By Daniel Emery

Technology reporter, BBC News

**Canadian singer Justin Bieber's has become the target of a viral campaign to send him to North Korea.**

A website polled users as to which country he should tour next, with no restrictions on the nations that could be voted on.

There are now almost half a million votes to send the singer to the secretive communist nation.

The contest, which ends at 0600 on 7 July, saw North Korea move from 24th to 1st place in less than two days.

Many of the votes are thought to originate from imageboard website 4chan, which has built a reputation for triggering online viral campaigns.




It is highly unlikely Bieber would be given permission to enter North Korea

## Related Stories

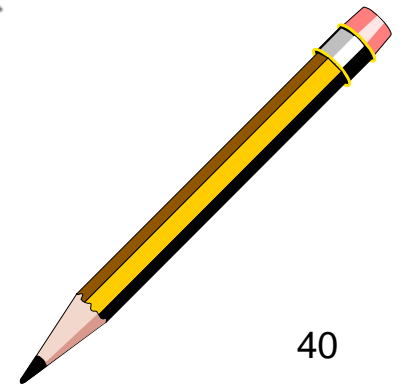
<http://www.bbc.com/news/10506482>

# Difference between response, response rate and representativeness

Concept	Definition	Example
Response	Number of answers	5,000
Response rate	Response divided by the number of invitations	10%
Representativeness	Whether respondents you get are typical of the users you want	

# Did we get answers from the right people?

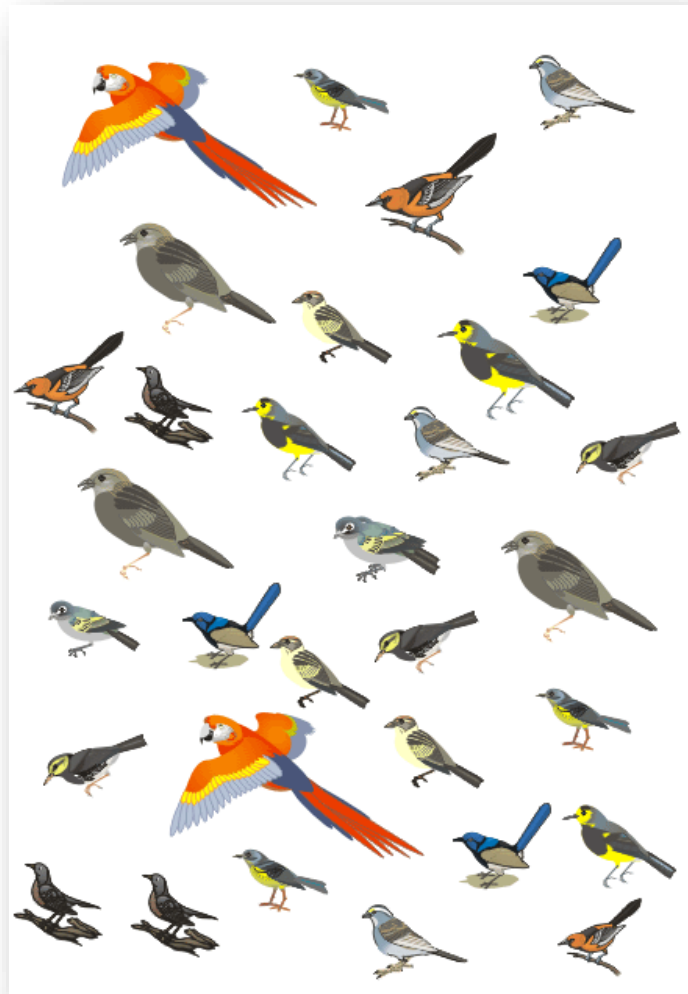
Is this sample representative?



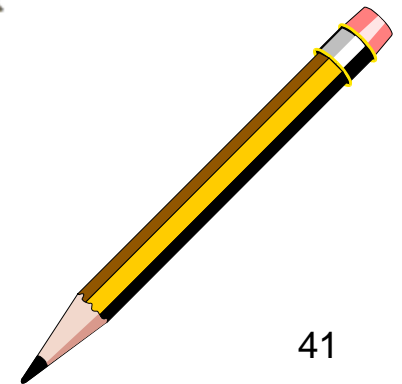


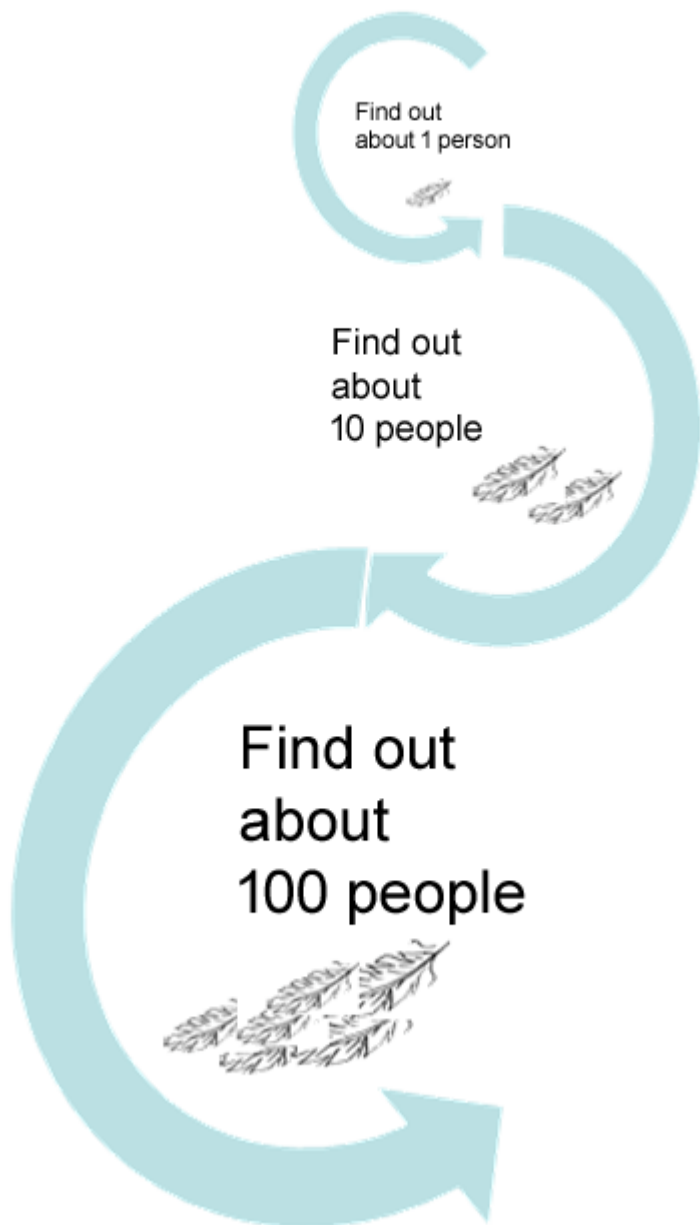
# Check the representativeness of your sample

Population of assorted birds



Is this sample representative?





Iterate,  
improve,  
increase

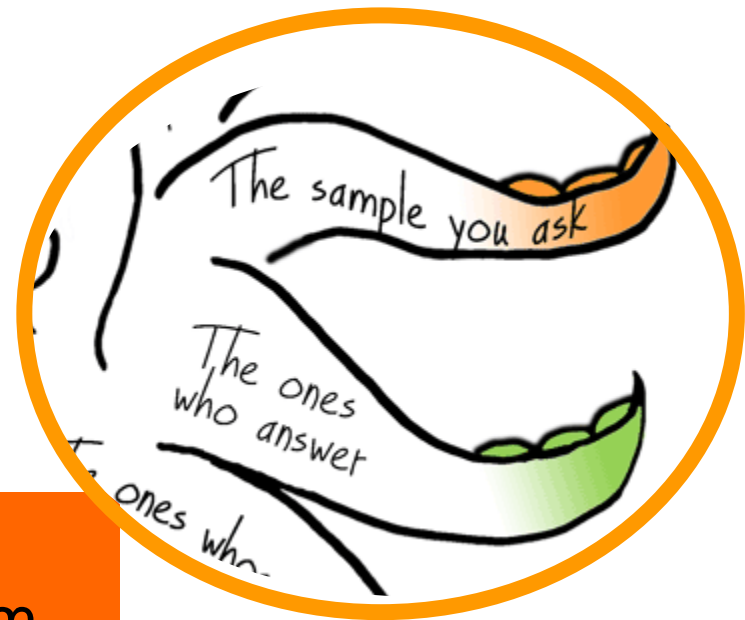
to understand  
the people you  
want to ask

# Decide how to target the correct people

- Go where they are
- Use a list
- Buy a sample
- Send and hope
- Try a 'snowball'



# Non-response error is the one that hurts

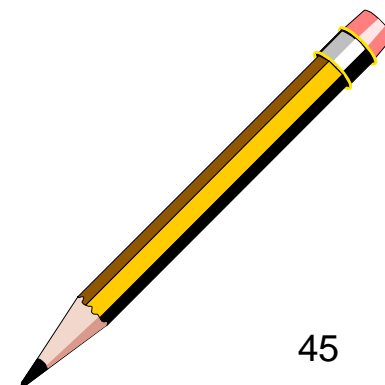


**Non-response error:**  
The ones who answer differ from the ones you ask in a way that affects the survey statistic

# Let's try the toothpaste



Image credit: Caroline Jarrett



Worry-Free Roaming in our Europe Zone. If you're heading further afield, you could still take your UK minutes, texts and data with you - it costs just £5 a day (exc. VAT) in our World Zone. Simply text ADD to [40508](#). To stop receiving texts, send STOP to 9774.

Yesterday 10:01

Hello, we'd like to ask you 3 questions about your most recent contact with Vodafone. All texts are free, and the 1st question will follow shortly



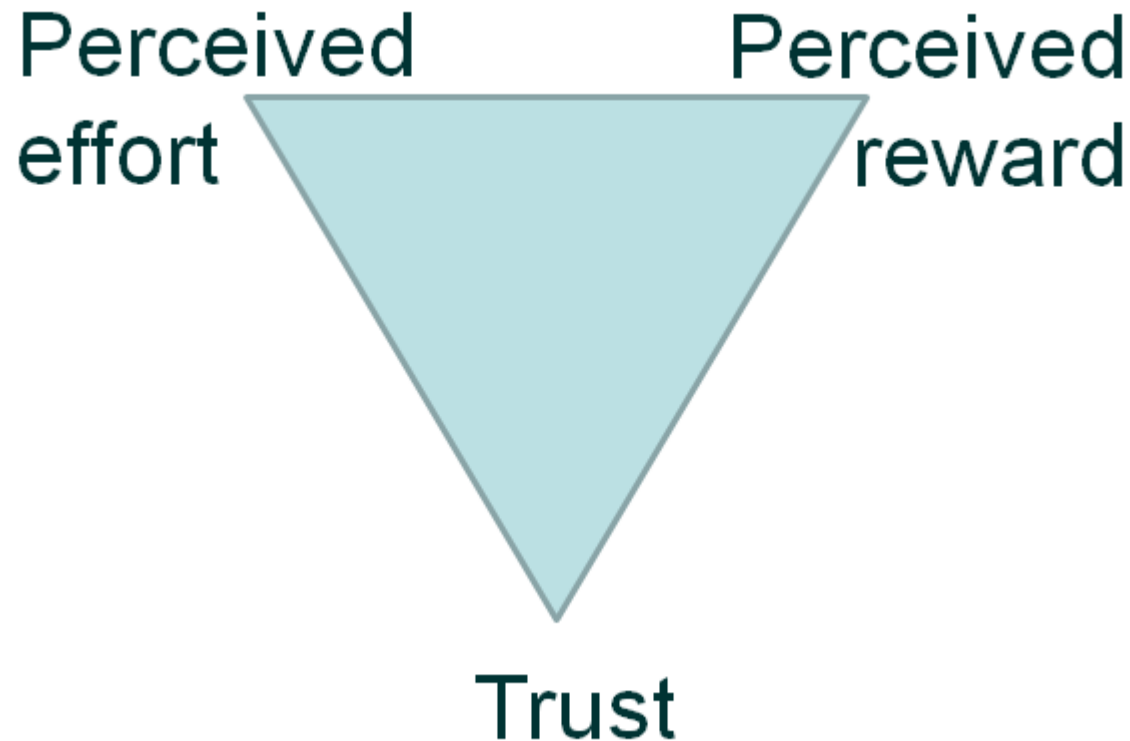
Text Message

Send

# I wanted to tell them something

- Perceived effort: three questions is OK
- Perceived reward: the opportunity to tell them something
- Trust: Probably enough

# Response depends on effort, reward and trust





# Response relies on effort, reward, and trust

## Luton Business Survey 2011 - YOUR HELP IS NEEDED

Adams, Orchid <Orchid.Adams@luton.gov.uk>

Sent: Mon 06/06/2011 09:49

To:

Message

image007.gif (841 B)	image009.jpg (2 KB)	image011.jpg (2 KB)	image002.gif (841 B)	image003.jpg (2 KB)
image004.jpg (2 KB)	image005.gif (841 B)	image006.jpg (2 KB)	image007.jpg (2 KB)	image002.gif (845 B)
image003.jpg (2 KB)	image004.jpg (2 KB)	image005.gif (845 B)	image006.jpg (2 KB)	image007.jpg (2 KB)

We want Luton to be a great place to do business.  
We need your help to make this happen.

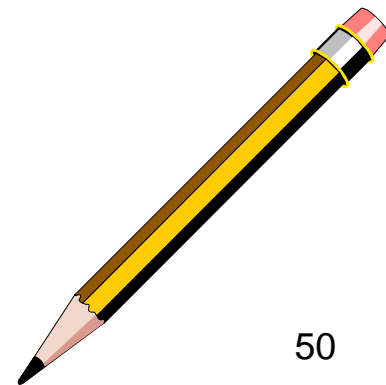


Luton Borough Council, alongside BMG Research, are currently conducting a business survey about the needs of local businesses. This will help the Council to effectively shape and deliver services that support long term economic growth. We would be grateful if you could participate in this online survey and help us to help you. The survey will expire on 26<sup>th</sup> June 2011

[Click Here to Complete Survey](#)

# An example survey

- Jane went shopping for a iPhone cover for her daughter's phone. There was very little choice, but they found one that was OK. Then there weren't any tills.  
"The experience was surprisingly poor for such a big brand"
- Will Jane decide to answer the survey?





Mac

iPad

iPhone

Watch

TV

Music

Support



# We want to hear from you.

We would appreciate feedback on your experience at the Apple Store so we can make your next visit even better. Five minutes is all we need.

[Get Started](#)

# Your views

What is the perceived effort?

What is the perceived reward?

What about trust?

We want to hear  
from you.

We would appreciate feedback on your experience at the  
Apple Store so we can make your next visit even better.  
Five minutes is all we need.



# There's often a 'zone of indifference'



Hate it

Love it

# Jane had a question for Apple

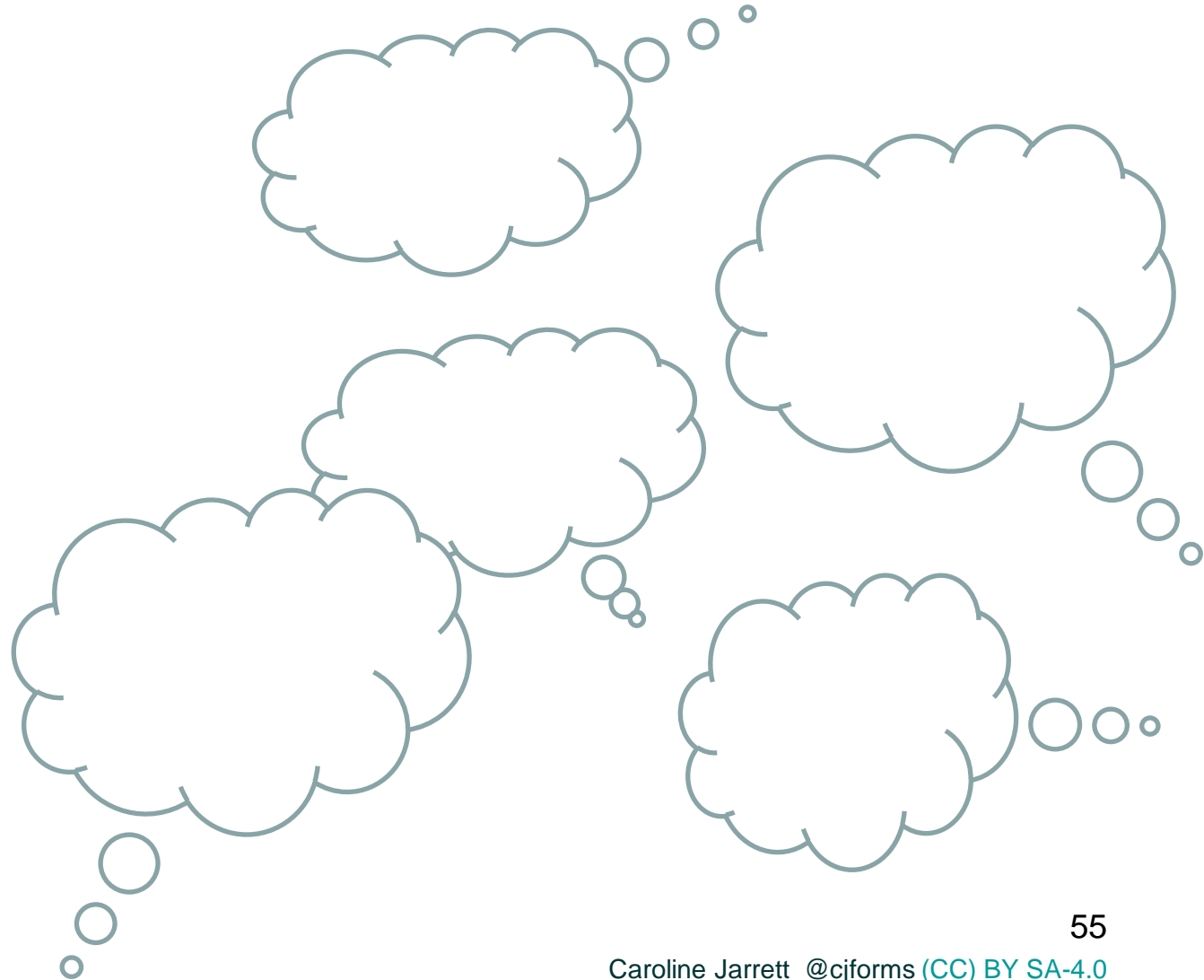
Burning  
Issue



Why don't you have tills?

# What do people want to tell you?

Burning  
Issues



# Overcome the 'Zone of Indifference' by asking about the Burning Issues

Sample

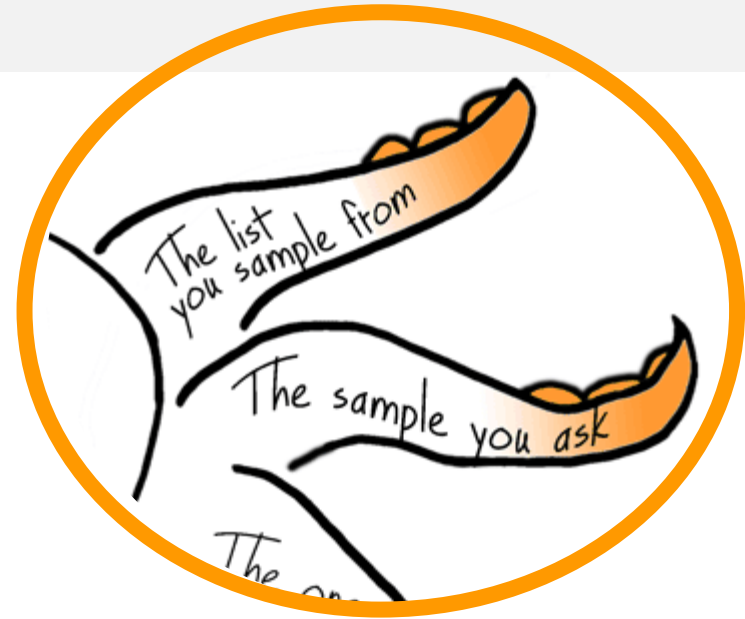




# Think about the people you want to ask

- Who are they?
- How will you find them?
- Do they want to answer your questions?
- What do they want to tell you?

# There is always sampling error



Sampling error:  
Ask a sample instead of  
asking everyone

# If you get all the other decisions right, then you can calculate a margin of error



[Home](#) [How It Works](#) [Examples](#) [Survey Services](#) [Plans & Pricing](#)

## Margin of Error Calculator

Can you rely on your survey results? By calculating your margin of error (also known as a confidence interval), you can tell how much the opinions and behavior of the sample you survey is likely to deviate from the total population. This margin of error calculator makes it simple.

### Calculate Your Margin of Error:

? Population Size:

? Confidence Level (%):

? Sample Size:

Calculate

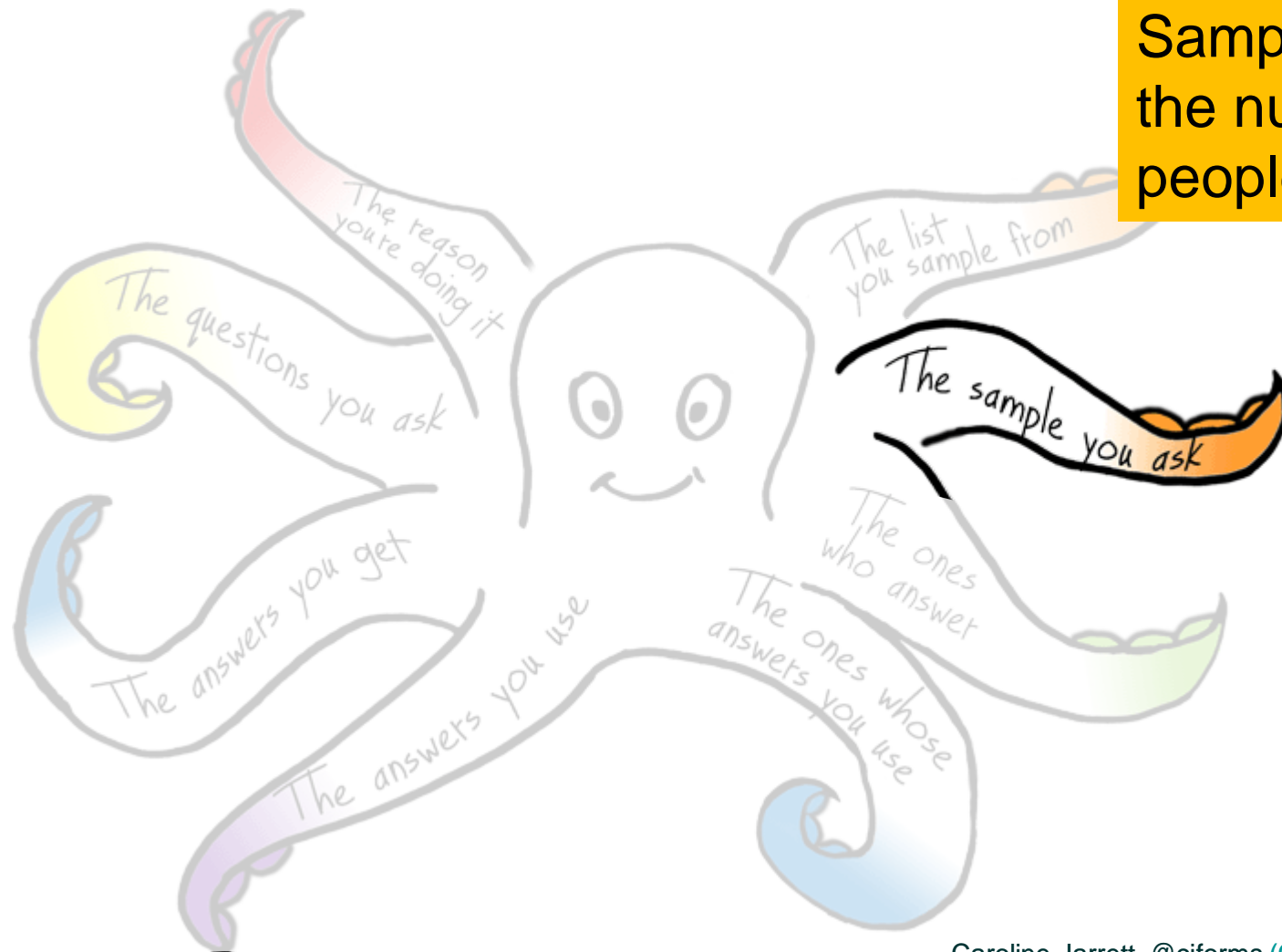
### Margin of Error (%)

—

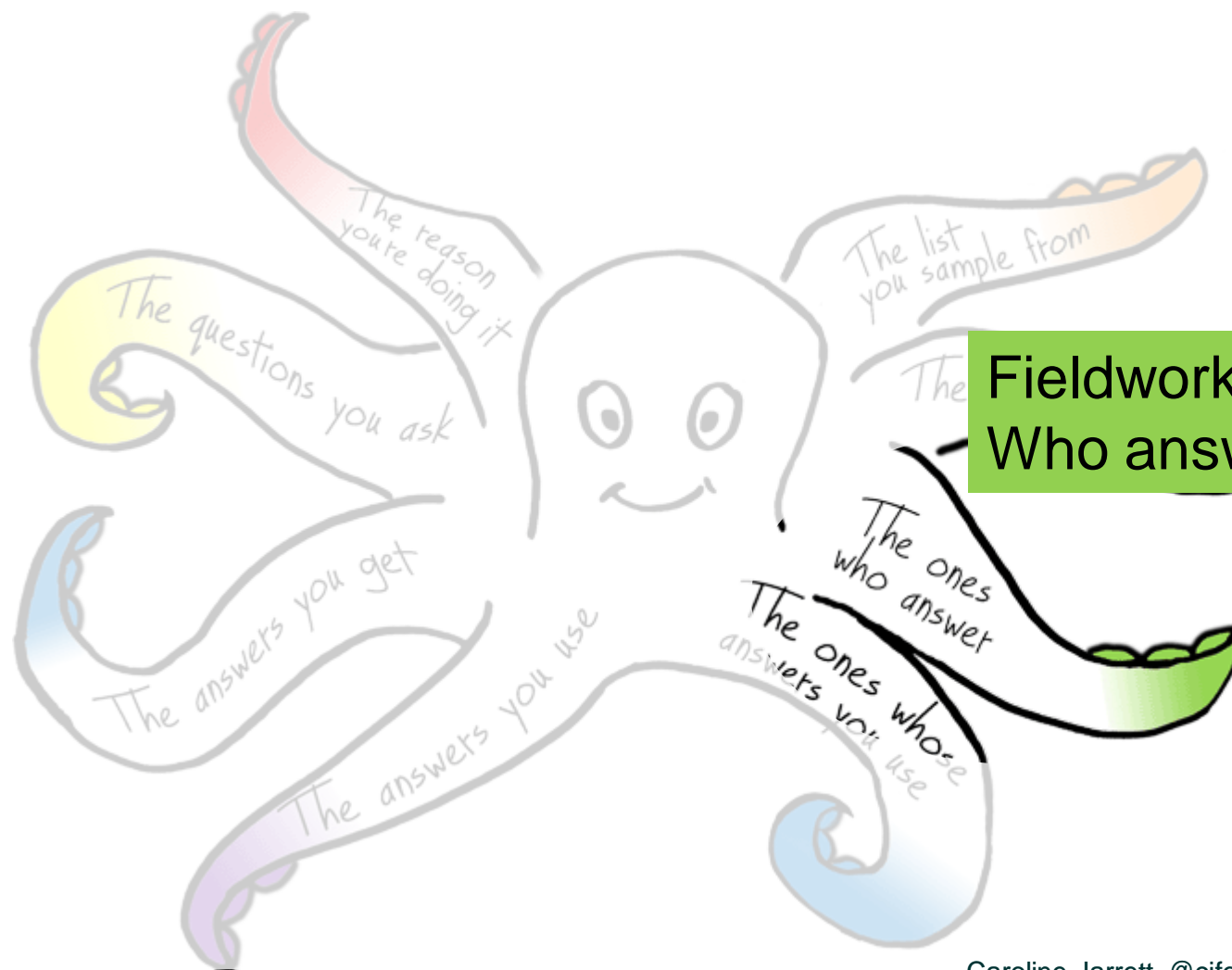
\*This margin of error calculator uses a normal distribution (50%) to calculate your optimum margin of error.

# Ask fewer people to get better response

Sample:  
the number of  
people to ask

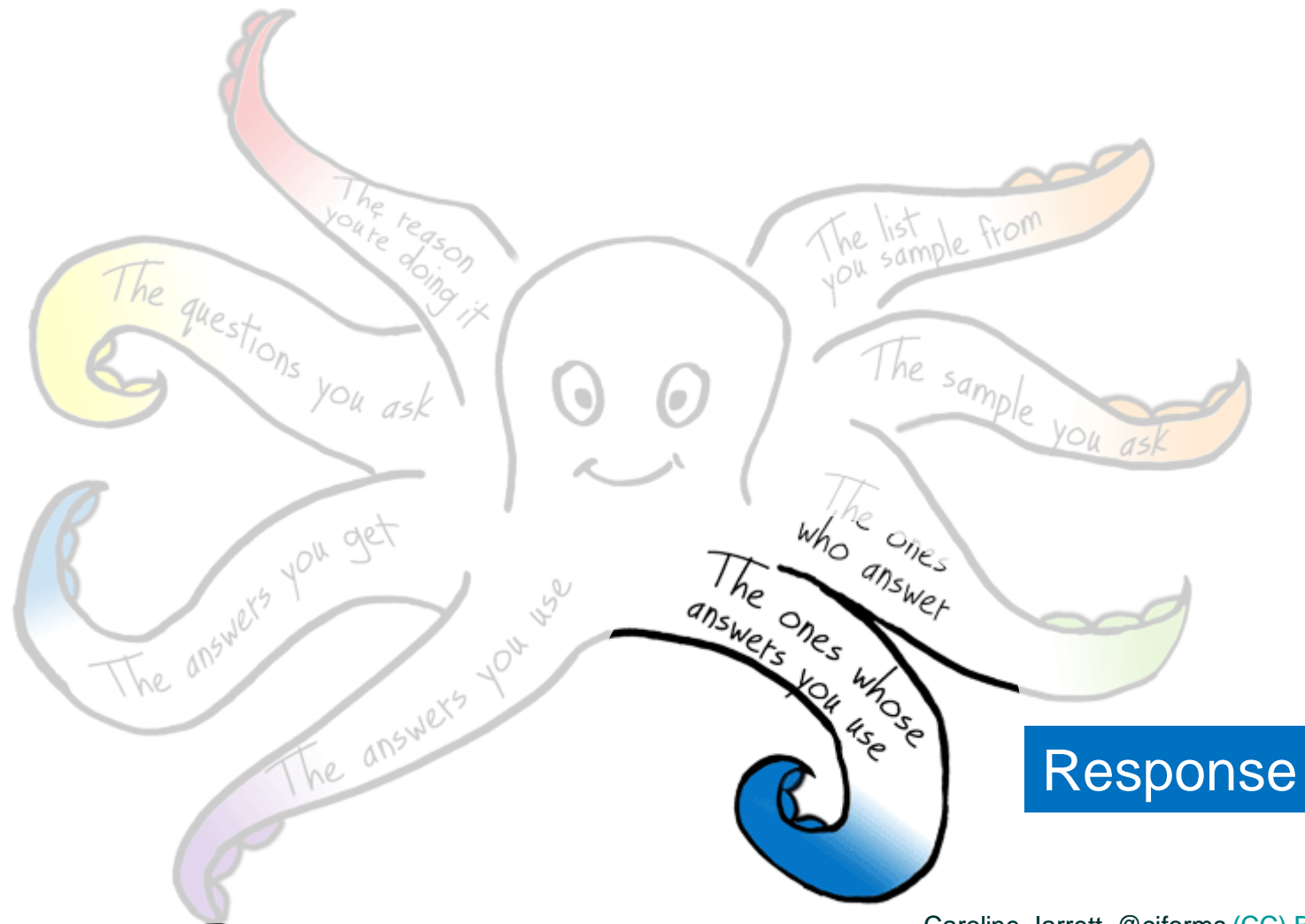


# Try mail, phone or face-to-face for better response rates



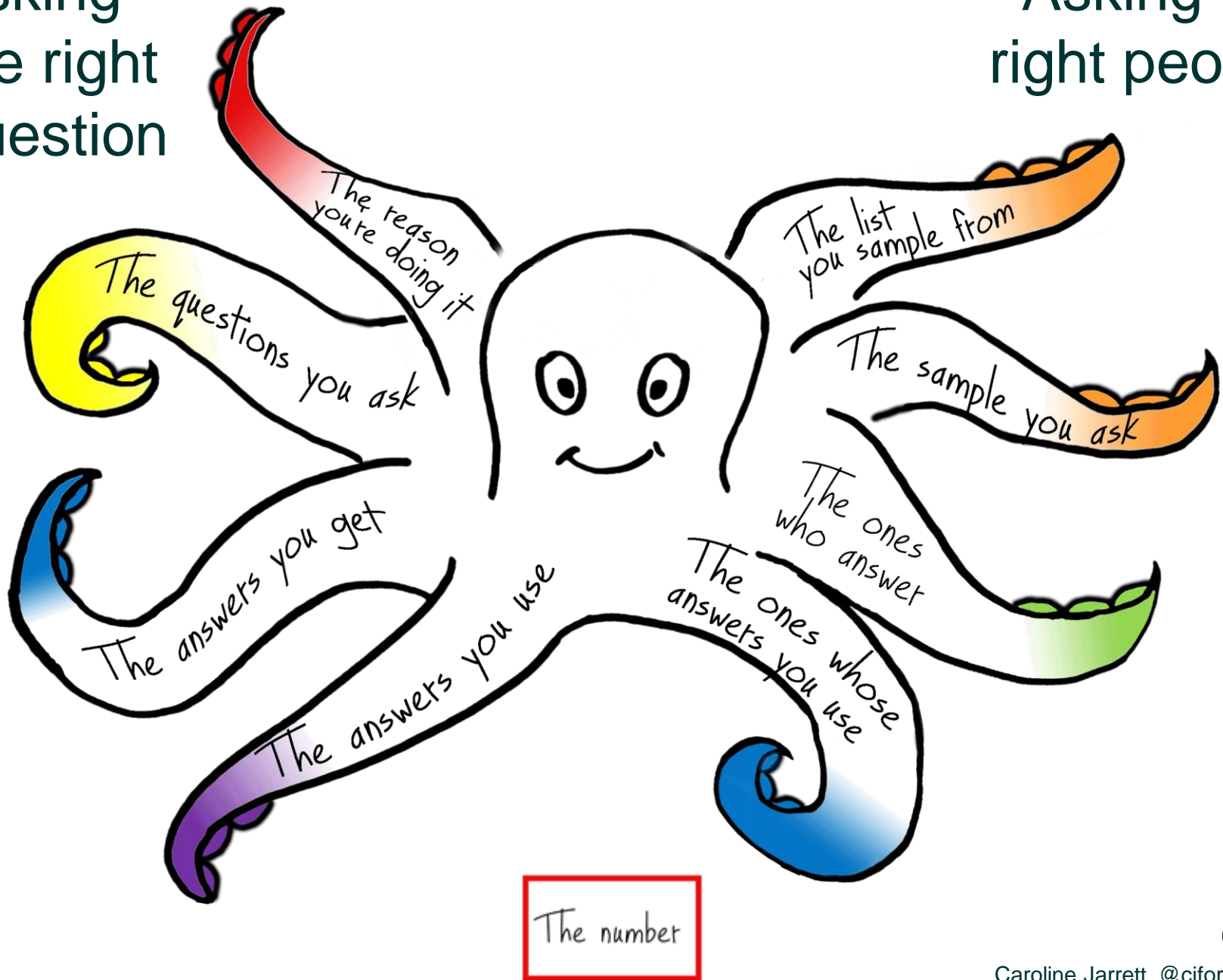
Fieldwork:  
Who answers?

# We don't just want answers, we want representative answers



# Asking the right question

# Asking the right people



What you want  
to ask about

Who you  
want to ask

Asking one  
person the  
right question

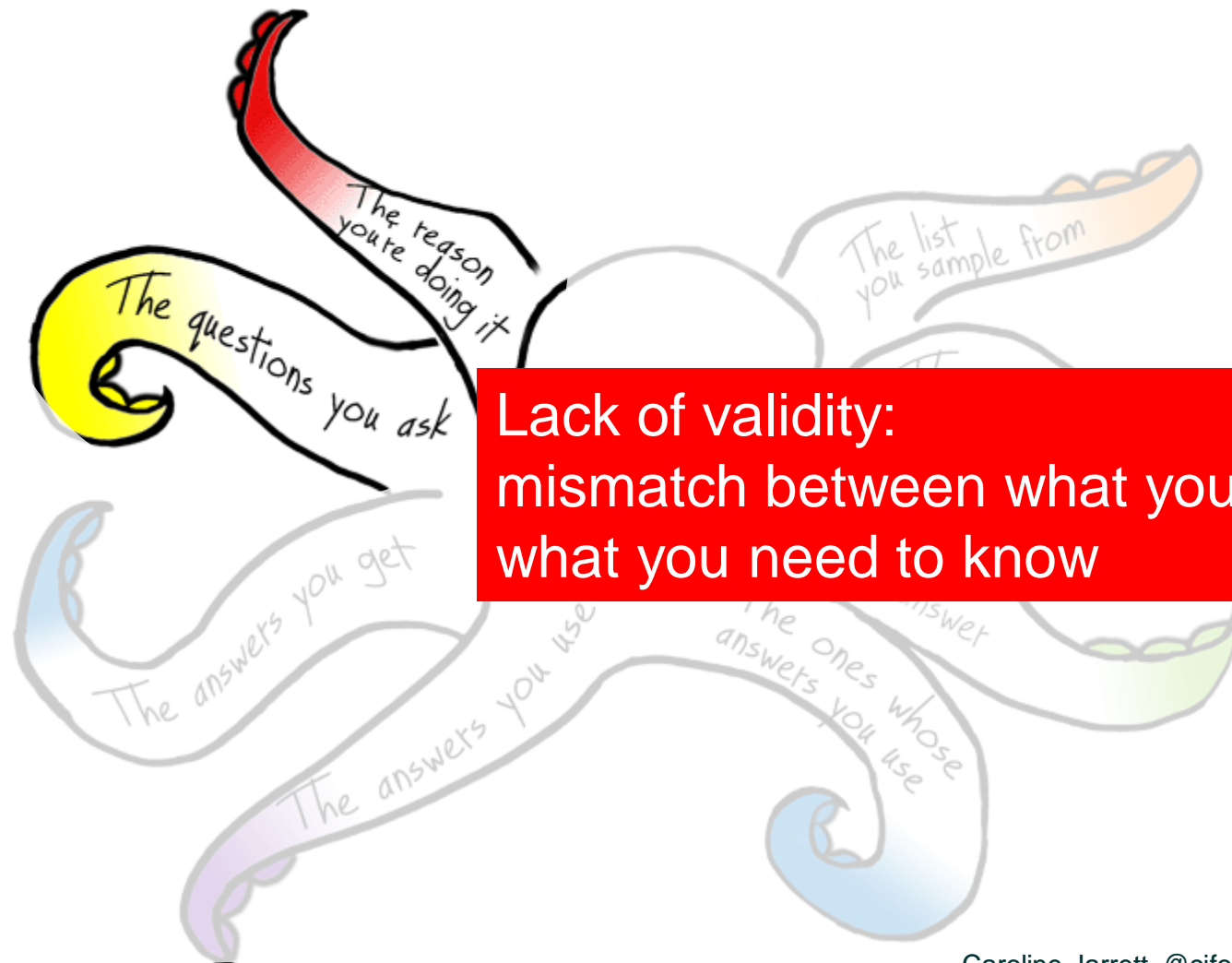
is better than

Asking 10,000  
people the  
wrong question


The number



# A survey is only valid if the questions match the reason you're doing it



# Here is a question from that survey



Are you aware that you can upgrade your contract or activate an iPhone on a rate plan with a mobile carrier directly at the Apple Store?

Apple

Most Crucial Question?

# Most Crucial Question meets Burning Issue

Are you aware that you can upgrade your contract or activate an iPhone on a rate plan with a mobile carrier directly at the Apple Store?

Apple

Why don't they have tills?



# The survey process

## Goals

Establish your goals for the survey



Questions you need answers to

## Sample

Decide who to ask and how many



People you will invite to answer

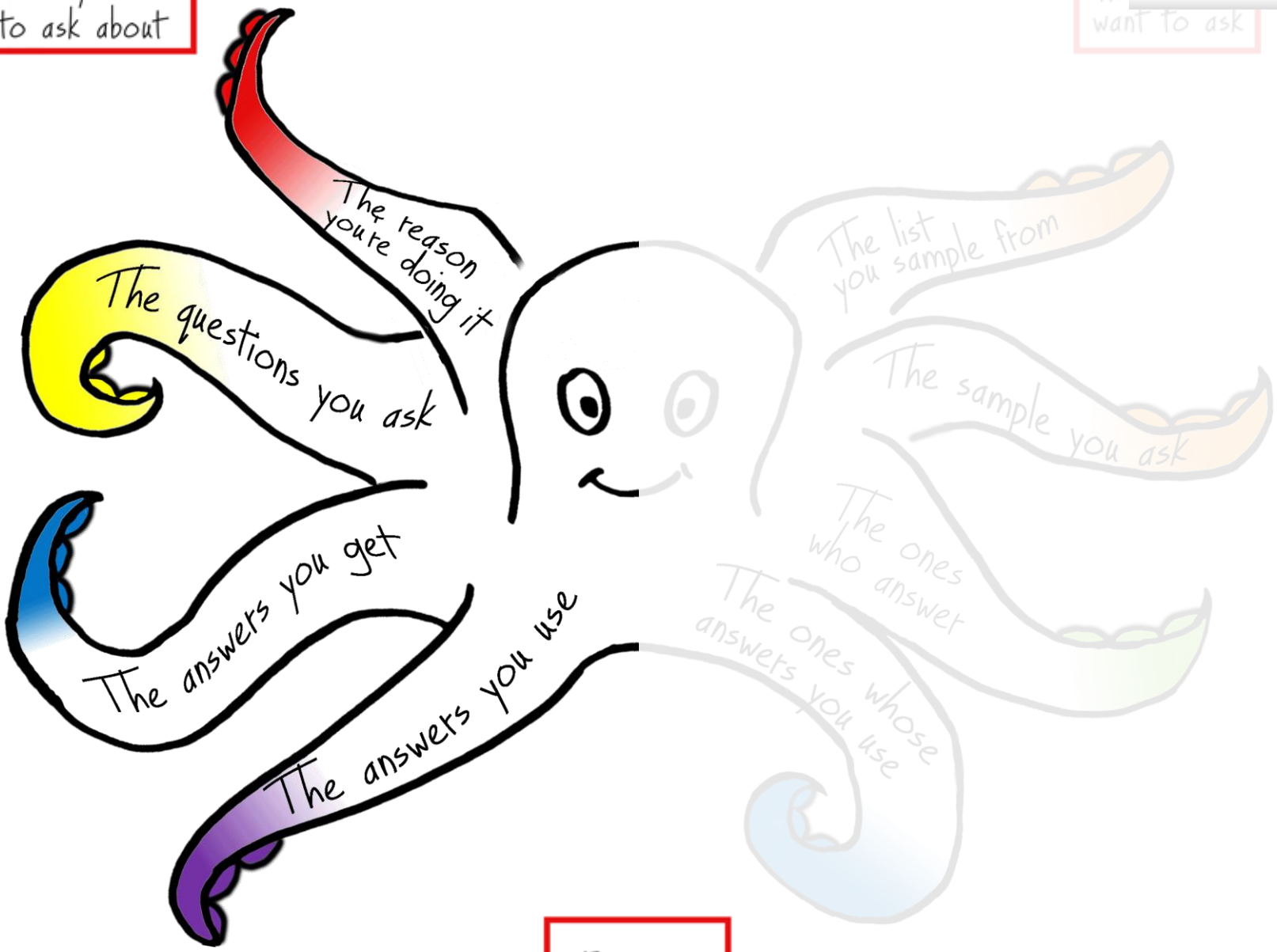
## Questions

Test the questions



Questions people can answer

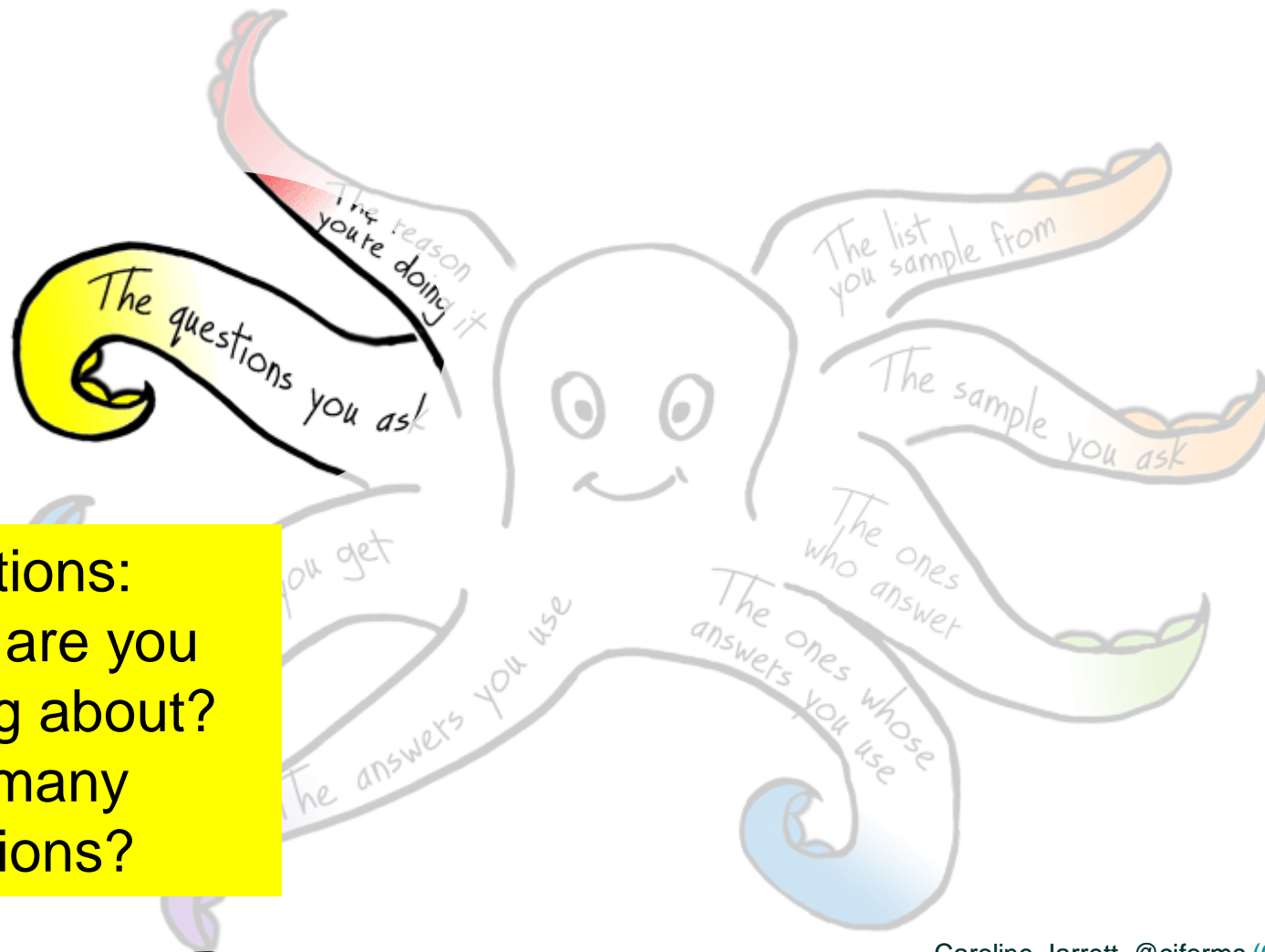
What you want to ask about



The number

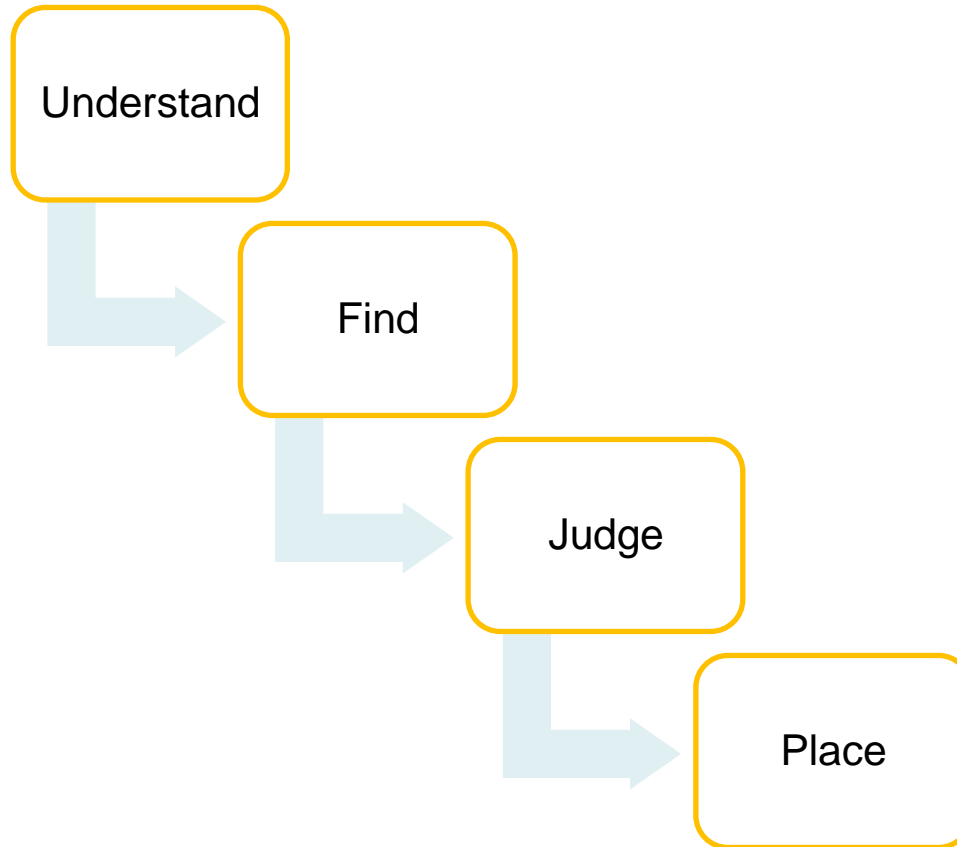
In your **last five days at work**, what percentage of your work time do you estimate that you spent using publicly-available online services (not including email, instant messaging, and search) to do your work using a work computer or other device?

# Helps a lot if you ask good questions



Questions:  
What are you asking about?  
How many questions?

# There are four steps to answer a question







# There are four steps to answer a question

Step	A good question ...
1. Read and understand	is legible and makes sense
2. Find an answer	asks for answers that we know
3. Judge the answer	asks for answers we're happy to reveal
4. Place the answer	offers appropriate spaces for the answers

# Four step examples:

## 1: read and understand

**Are you...?**  
*Please select one response only.*

# Four step examples:

## 1: read and understand

Sometimes we look for people who work in particular industries. Do you work in any of the following?

*Please select all that apply.*

<input type="checkbox"/> Automotive	<input type="checkbox"/> Banking
<input type="checkbox"/> Education	<input type="checkbox"/> Health Care
<input type="checkbox"/> Journalism	<input type="checkbox"/> Market Research
<input type="checkbox"/> Marketing / PR / Advertising	<input type="checkbox"/> Not for Profit / Charity
<input type="checkbox"/> Retail	<input type="checkbox"/> Science
<input type="radio"/> None of the above	

Next

# Four step examples:

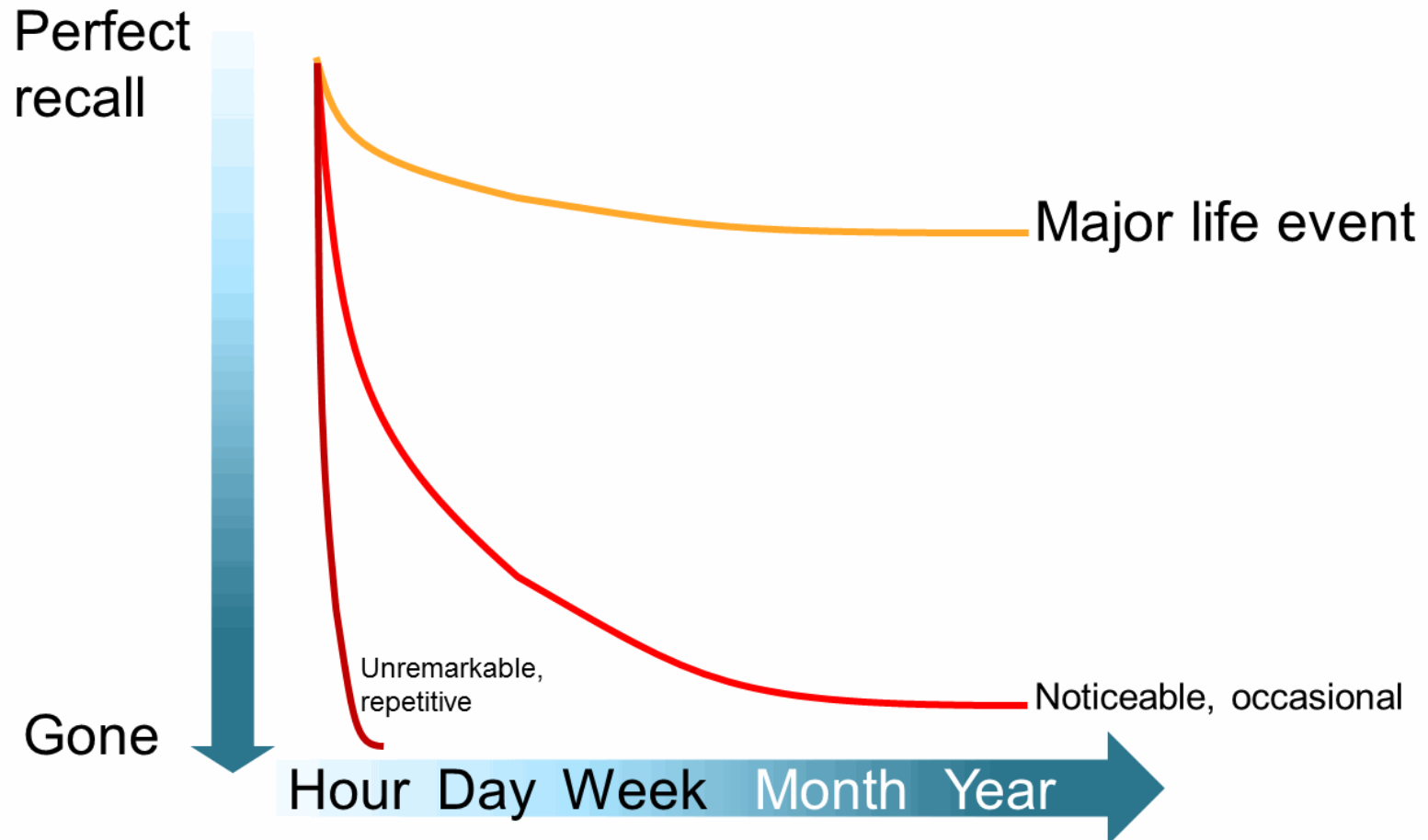
## 2: find the answer

### Question 25


In your **last five days at work**, what percentage of your work time do you estimate that you spent using publicly-available online services (not including email, instant messaging, and search) to do your work using a work computer or other device?

In your last five days at work, what percentage of your work time do you estimate that you spend using publicly-available online services (not including email, instant messaging and search) to do your work using a work computer or other device?

# The approximate curve of forgetting



# Four step examples: 3: judge the answer

**\* 11. I think it is safe to challenge the way things are done in** 

- Strongly agree
- Agree
- Neither
- Disagree
- Strongly disagree

# Four step examples: 4: place the answer

**Where do you currently live?**

*Please make a selection on the map.*





**Please indicate to which occupational group the Chief Income Earner in your household belongs, or which group fits best.**

**This could be you: the Chief Income Earner is the person in your household with the largest income.**

**If the Chief Income Earner is retired and has an occupational pension please answer for their most recent occupation.**

**If the Chief Income Earner is not in paid employment but has been out of work for less than 6 months, please answer for their most recent occupation.**

- Semi or unskilled manual work  
(e.g. Manual workers, all apprentices to be skilled trades, Caretaker, Park keeper, non-HGV driver, shop assistant)

---

- Skilled manual worker  
(e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, AA patrolman, pub/bar worker, etc)

---

- Supervisory or clerical/ junior managerial/ professional/ administrative  
(e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc)

---

- Intermediate managerial/ professional/ administrative  
(e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director small organisation, middle manager in large organisation, principal officer in civil service/local government)

---

- Higher managerial/ professional/ administrative  
(e.g. Established doctor, Solicitor, Board Director in a large organisation (200+ employees, top level civil servant/public service employee))

---

- Student

---

- Casual worker - not in permanent employment

---

- Housewife/ Homemaker

---

- Retired and living on state pension

---

- Unemployed or not working due to long-term sickness

---

- Full-time carer of other household member

---

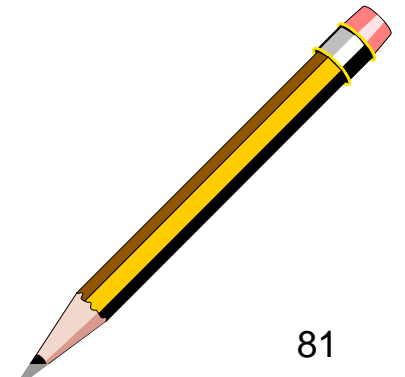
- Other

Understand  
Find  
Judge  
Place



# Write a better version of this question

In your **last five days at work**, what percentage of your work time do you estimate that you spent using publicly-available online services (not including email, instant messaging, and search) to do your work using a work computer or other device?



On your most recent working day,  
what percentage of time did you spend  
using the Internet?

%

# Do you use the Internet for your work?

Yes

No

Other

# Write good questions

- Mix question types: choice and open
- Avoid leading questions
- Present one question at a time
- Keep positive; negatives are harder to understand
- Ask questions that users can answer



# The survey process

Goals

Establish your goals for the survey



Questions you need answers to

Sample

Decide who to ask and how many



People you will invite to answer

Questions

Test the questions



Questions people can answer

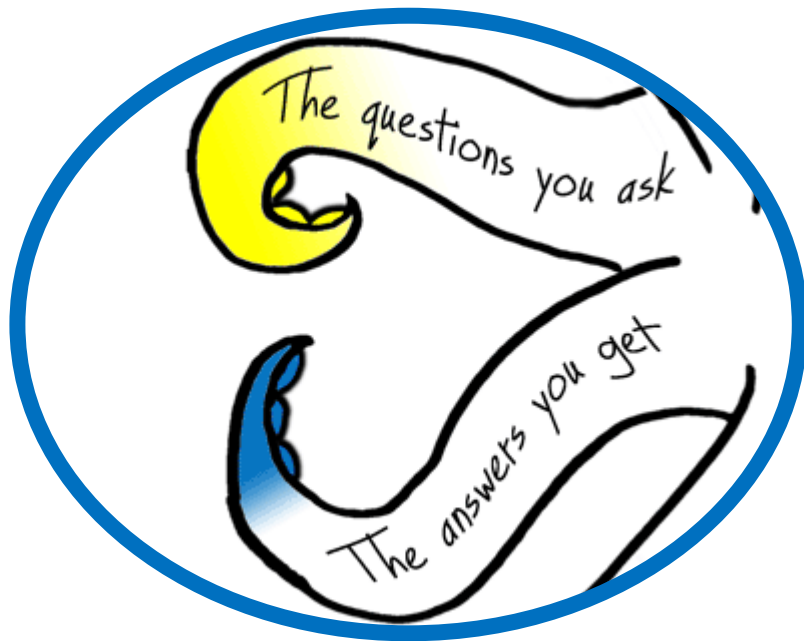
Questionnaire

Build the questionnaire



Questions people can interact with

# A good question gets good answers



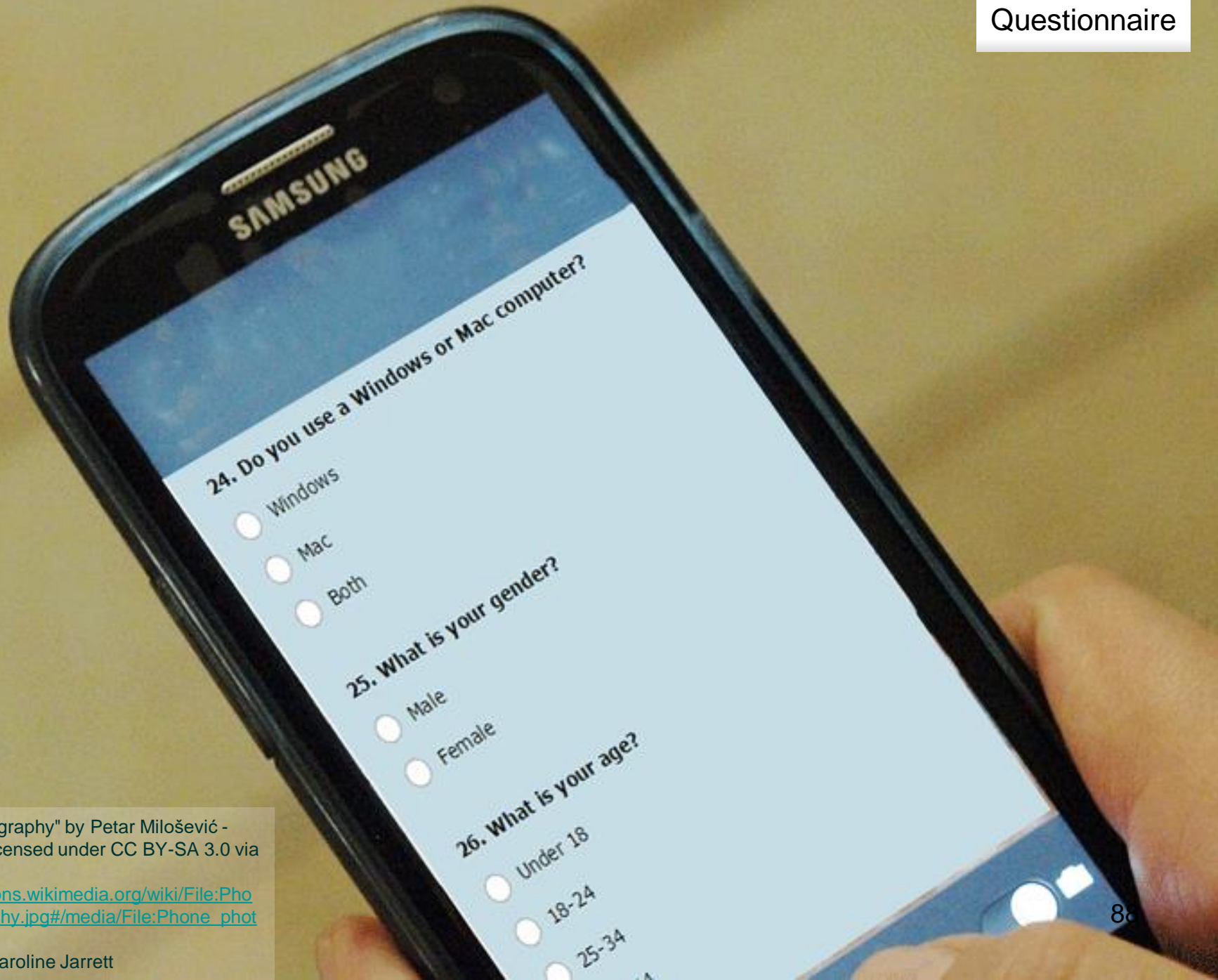
Measurement error:  
Mismatches between  
the questions you ask and  
the answers that people give you

**24. Do you use a Windows or Mac computer?**

- Windows
- Mac
- Both

**25. What is your gender?**

- Male
- Female



24. Do you use a Windows or Mac computer?

- Windows
- Mac
- Both

25. What is your gender?

- Male
- Female

26. What is your age?

- Under 18
- 18-24
- 25-34

"Phone photography" by Petar Milošević - Own work. Licensed under CC BY-SA 3.0 via Commons - [https://commons.wikimedia.org/wiki/File:Phone\\_photography.jpg#/media/File:Phone\\_photography.jpg](https://commons.wikimedia.org/wiki/File:Phone_photography.jpg#/media/File:Phone_photography.jpg) Modified by Caroline Jarrett



# Tip

Always allow for 'other'



# “Place the answer” is also about using the right widget to collect the answer

Use	For
Radio buttons	A single known answer
Check boxes	Multiple known answers
Text boxes	Unknown answers

# Likert had several types of response format in his scales

13. How much military training should we have?
- (a) We need universal compulsory military training. (1)
  - (b) We need Citizens Military Training Camps and Reserve Officers Training Corps, but not universal military training. (2)
  - (c) We need some facilities for training reserve officers but not as much as at present. (3)
  - (d) We need only such military training as is required to maintain our regular army. (4)
  - (e) All military training should be abolished. (5)

17. The United States, whether a member or not, should co-operate fully in the humanitarian and economic programs of the League of Nations.
- |                            |                |                  |                   |                               |
|----------------------------|----------------|------------------|-------------------|-------------------------------|
| Strongly<br>Approve<br>(5) | Approve<br>(4) | Undecided<br>(3) | Disapprove<br>(2) | Strongly<br>Disapprove<br>(1) |
|----------------------------|----------------|------------------|-------------------|-------------------------------|

# You can find an academic paper to support almost any number of response points

- Krosnick and Presser refer to ~87 papers on response points

	Completely satisfied	Very satisfied	Quite satisfied	Neither satisfied nor dissatisfied	Quite dissatisfied	Very dissatisfied	Completely dissatisfied
Your outward journey with easyJet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your whole experience with easyJet on this latest occasion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

True False

I usually get what I want in life.

I need to be kept informed about news events.

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Not Applicable
	5	4	3	2	1	
Overall, I was satisfied with my experience in Hayward Dining Room	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please tell us how your experience at John Lewis compares to each of the other retailers you have visited?

	John Lewis is WORSE	About the same	John Lewis is BETTER
Supermarket	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other local store/independent retailer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

1. Is this OK? Tell us if you agree with us

Strongly agree  
 Agree  
 Disagree  
 Strongly disagree

2. Tell us more about this

Very Unimportant				Very Important
1	2	3	4	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

1: \*Please rate how well the site is organized.

1=poor Excellent=10

1  2  3  4  5  6  7  8  9  10  Don't Know

# Grids are often full of problems at all four steps

BBC

## OPINION SURVEY

You have completed 48% of the survey so far.

100%

For the following statements about the **Commercial Availability** site, please give a mark out of 10, where 1 indicates 'Strongly Disagree' and 10 indicates 'Strongly Agree'.

	1	2	3	4	5	6	7	8	9	10	Don't know
It's the kind of website I would talk to other people about	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I felt I learnt something new from visiting this website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This website inspired me to do something new	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I found this website engaging	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The website is up to date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The website is fresh and new	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The website reflects British culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

← Previous
Next →

powered by  
**eDigitalResearch**  
For informed direction

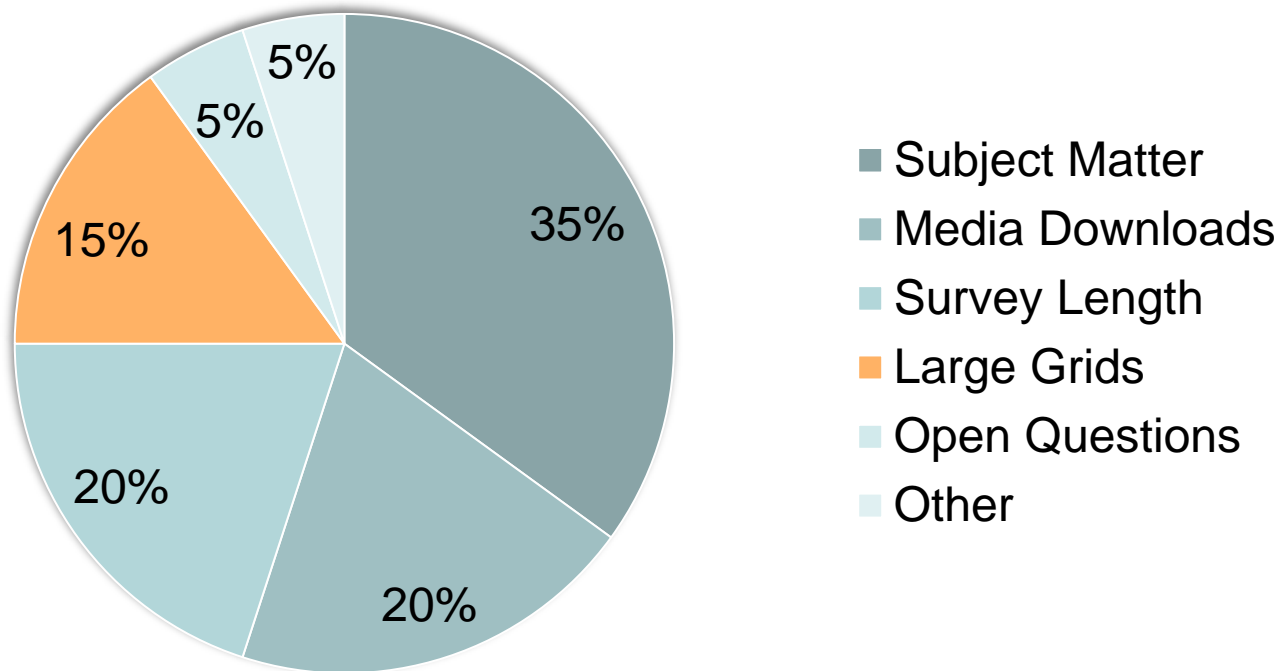
Click here to go back to [bbc.co.uk](http://bbc.co.uk)

BBC

For any comments about the content of this survey, please contact [bbc@digitalresearch.com](mailto:bbc@digitalresearch.com)  
About any other issue, please contact the BBC via <http://www.bbc.co.uk/feedback>  
If you would like further information please read the BBC's privacy policy at <http://www.bbc.co.uk/privacy>

# Grids are a major cause of survey drop-out

Total incompletes across the 'main' section of the questionnaire  
(after the introduction stage)

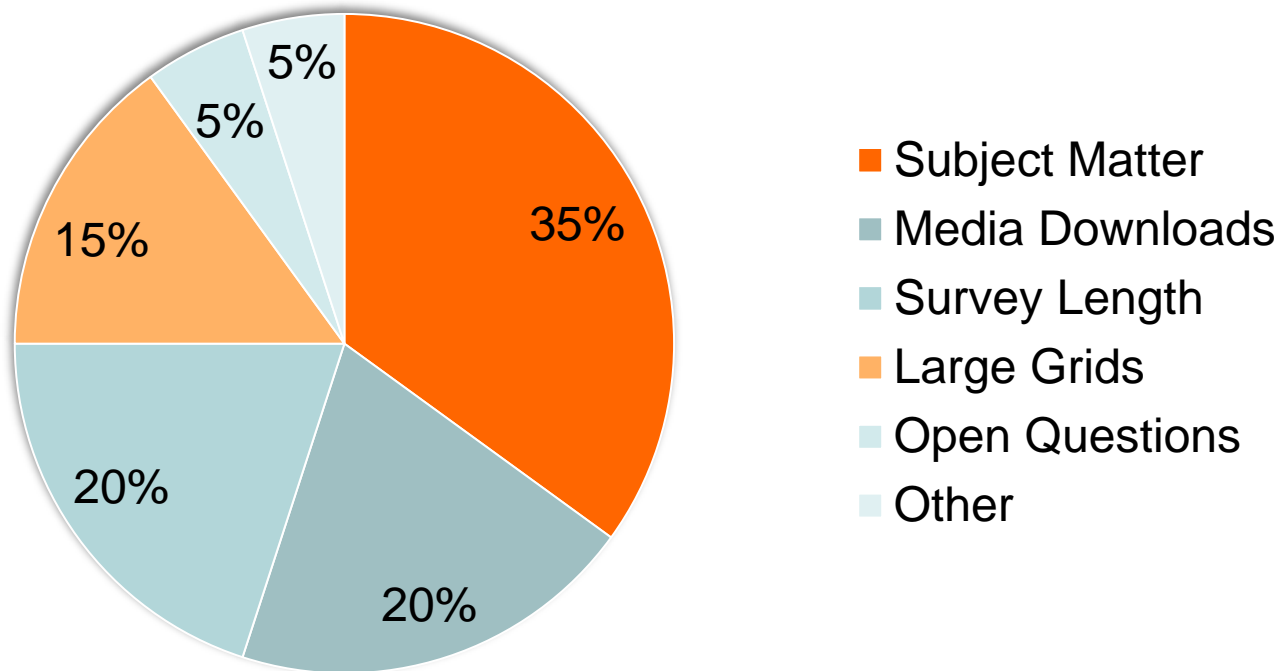


Source: Database of 3 million+ web surveys conducted by Lightspeed Research/Kantar

From Coombe, R., Jarrett, C. and Johnson, A. (2010) "Usability testing of market research surveys" ESRA Lausanne

# But it's the topic that matters most

Total incompletes across the 'main' section of the questionnaire  
(after the introduction stage)

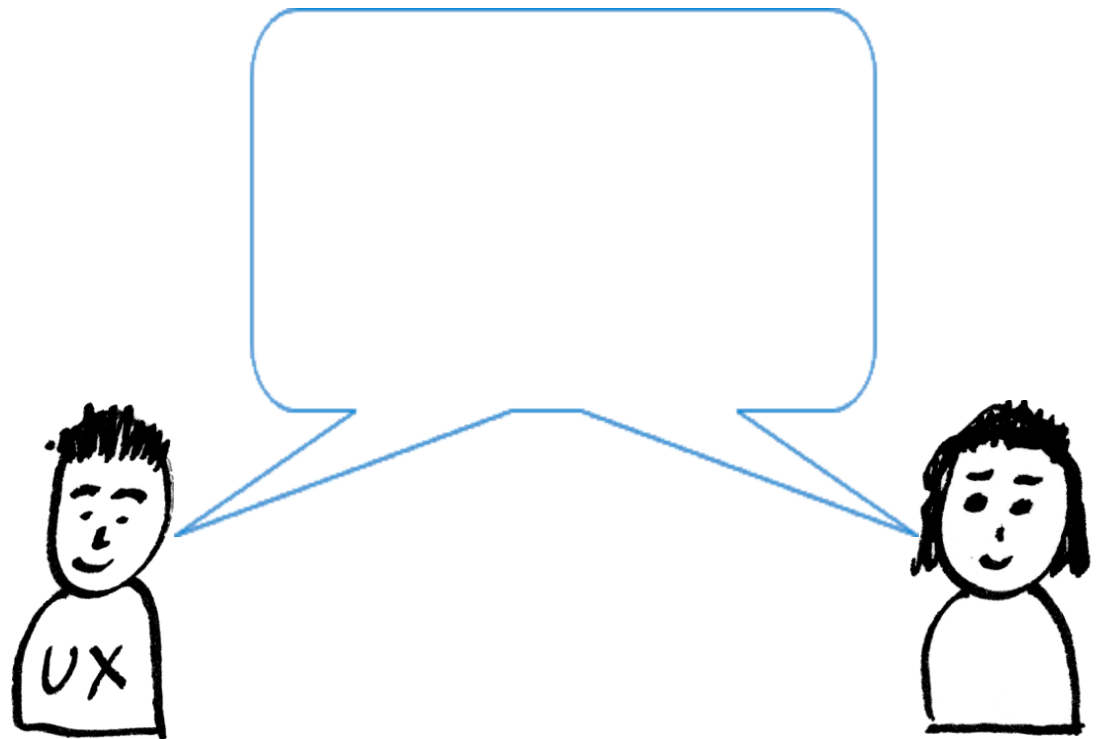


Source: Database of 3 million+ web surveys conducted by Lightspeed Research/Kantar

From Coombe, R., Jarrett, C. and Johnson, A. (2010) "Usability testing of market research surveys" ESRA Lausanne

# Tip

Test your questions by interviewing in context





Your answers to this survey are important for our work



But what's in it for me? And I'm really ready for a break.



# Agenda

## Introductions

Goals

Sample

## Break

Questions

Questionnaire

## Lunch

Fieldwork


## Break

Responses

Insights

## Finish


# 10 Laura Trott makes history with fourth gold medal - in the women's omnium

Survey About 

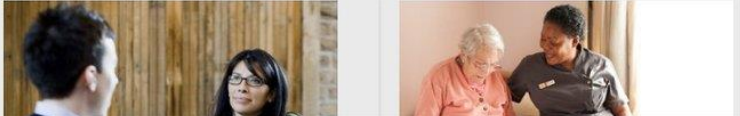
**I feel really close to the Guardian**




- Agree strongly
- Agree slightly
- Neither agree nor disagree
- Disagree slightly
- Disagree strongly

Submit >

 **theguardian jobs**

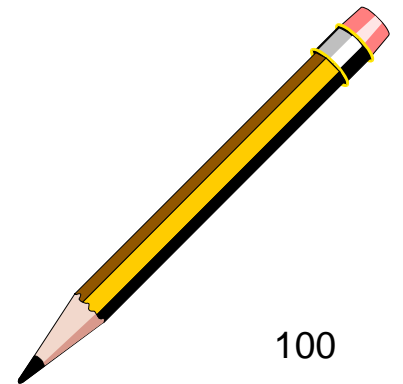
See more →



< >   

# Goals and sample for the survey

- We've had this request for help with a survey
- We'll be having a meeting to discuss the survey
- Decide on the topics you'll want to discuss at the meeting
- Also, prepare a suggestion for the Most Crucial Question



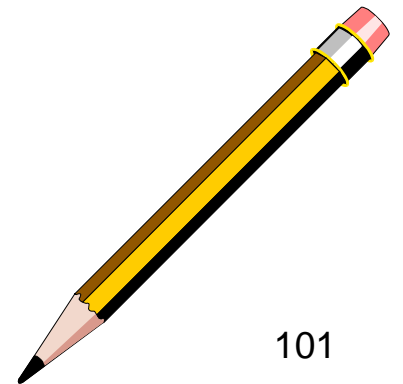
# Write a good question

We have discussed some possible questions

Decide on the question you will ask

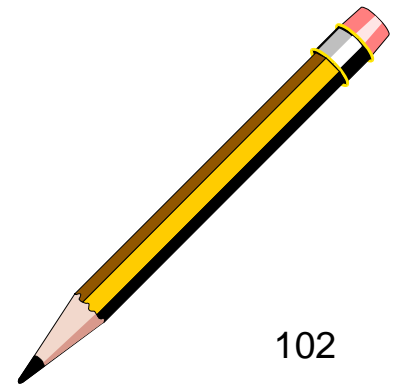
Check that users can:

- Read and understand it
- Find the answer
- Judge the answer

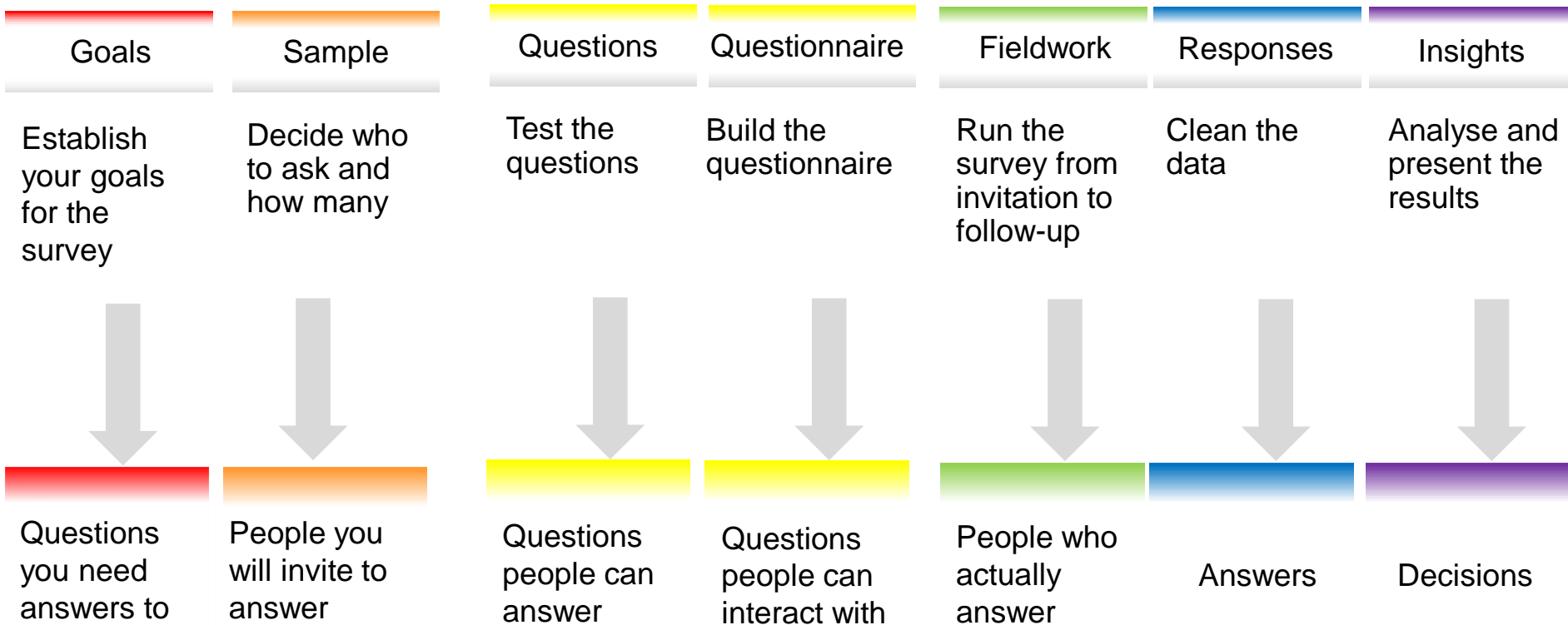


# Make a questionnaire

Make a paper version of your questionnaire  
(We'll be testing the questionnaires a bit later)



# The survey process



# The survey process

Fieldwork

Run the survey from invitation to follow-up




People who actually answer



**Dear Epson Customer, review your Epson Stylus Office BX625FWD**

Epson UK &lt;epsonnewsletter@info.epson-europe.com&gt;

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Sent: Fri 14/10/2011 09:29

To: caroline.jarrett@effortmark.co.uk

If you're having trouble viewing this email please [click here](#)

Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.

EPSON - EXCEED YOUR VISION



Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.

REVIEW YOUR Epson Stylus Office BX625FWD



Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture...

**Dear Epson customer,**

Thank you for choosing an Epson Stylus



Right-click here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.

Epson Stylus Office BX625FWD

**EPSON**<sup>®</sup>  
EXCEED YOUR VISION



# REVIEW YOUR EPSON STYLUS OFFICE BX625FWD



**Dear Epson customer,**

Thank you for choosing an Epson Stylus Office BX625FWD. We'd like to hear about your experience – please tell us what you think.

Your opinion is valuable to us, and will help us develop products that best meet your needs. [Your review](#) will also help others to choose the right product.

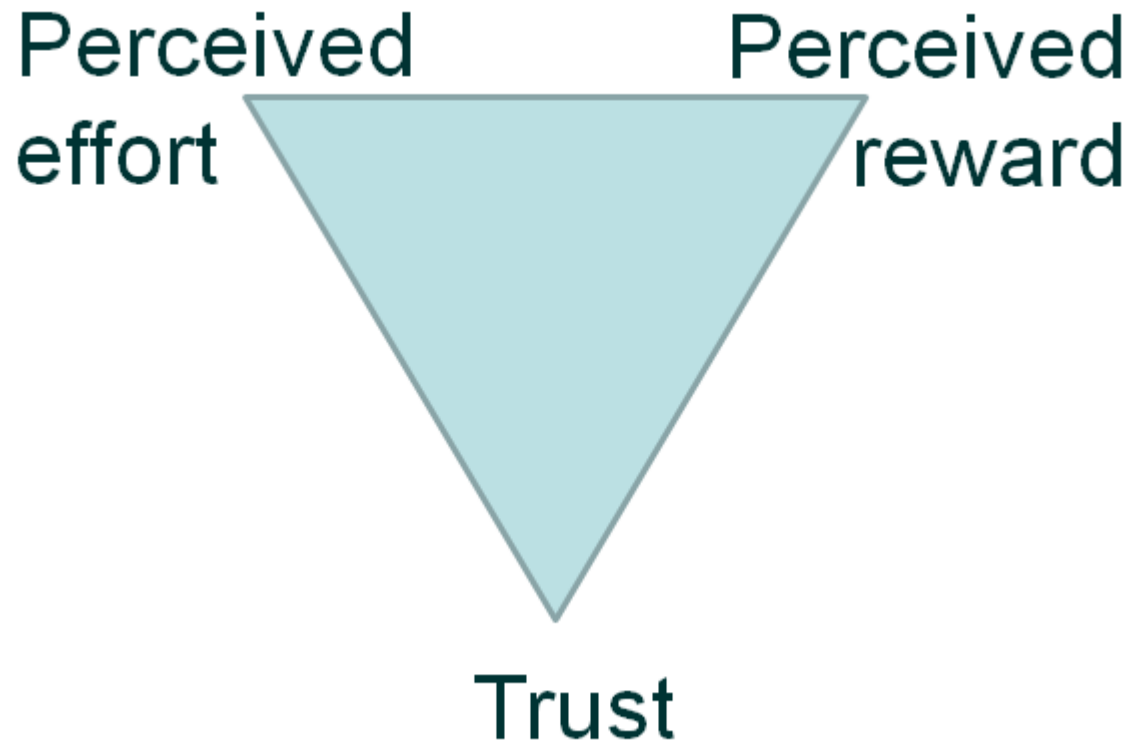
[WRITE YOUR REVIEW](#)



★★★★★ Written by Digger

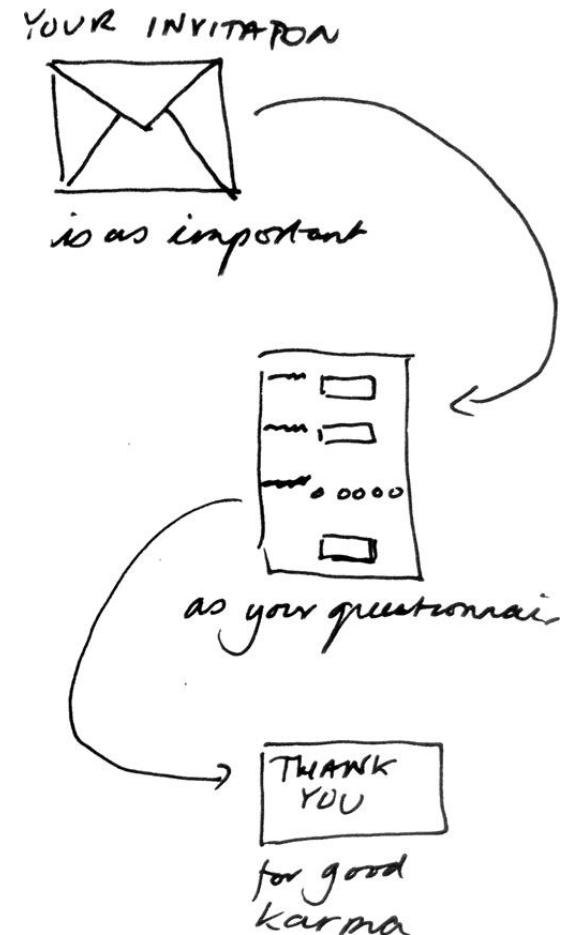
16 July 2011

# Recap: Response relies on effort, reward, and trust



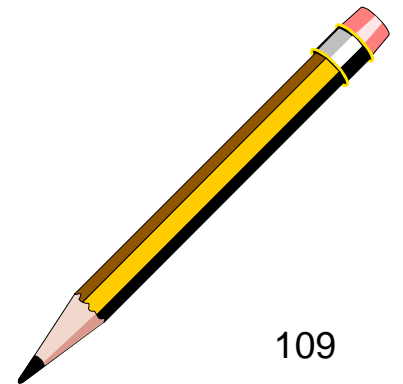
# The elements of a good invitation

- Trust:
  - Say who you are
  - Say why you've contacted this person specifically
- Perceived reward:
  - Explain the purpose of the survey
  - Explain why this person's responses will help that purpose
  - If there is an incentive, offer it
- Perceived effort:
  - Outline the topic of the survey
  - Say when the survey will close
  - Do NOT say how long it will take
    - (unless you have tested the heck out of it and are extremely sure that you know the answer)



# Write the invitation and thank-you

- Hints:
  - the invitation can be part of the questionnaire
  - thank-you is on a separate page

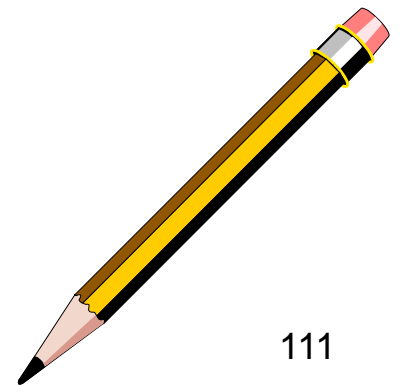


# Test it: pilot study

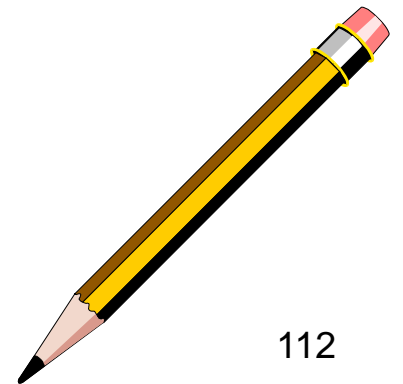
- Run the survey from invitation to the follow-up
- Look for mechanical problems like wrong link in the invitation, no thank-you page
- Find out what your response rate is so that you can work out your sample size

*“If you don’t have time to do a pilot study, you don’t have time to do the survey”*

# Test it



# Report back on your questionnaire





# Think about the test and iterate

- Are the people you tested with representative?
- Did you test the whole survey
  - From invitation to follow up?
  - Including the analysis of responses?
  - Including finding out whether you can make the decision?
- What do you need to change for the next version?

# Agenda

## Introductions

Goals

Sample

## Break

Questions

Questionnaire

## Lunch

Fieldwork

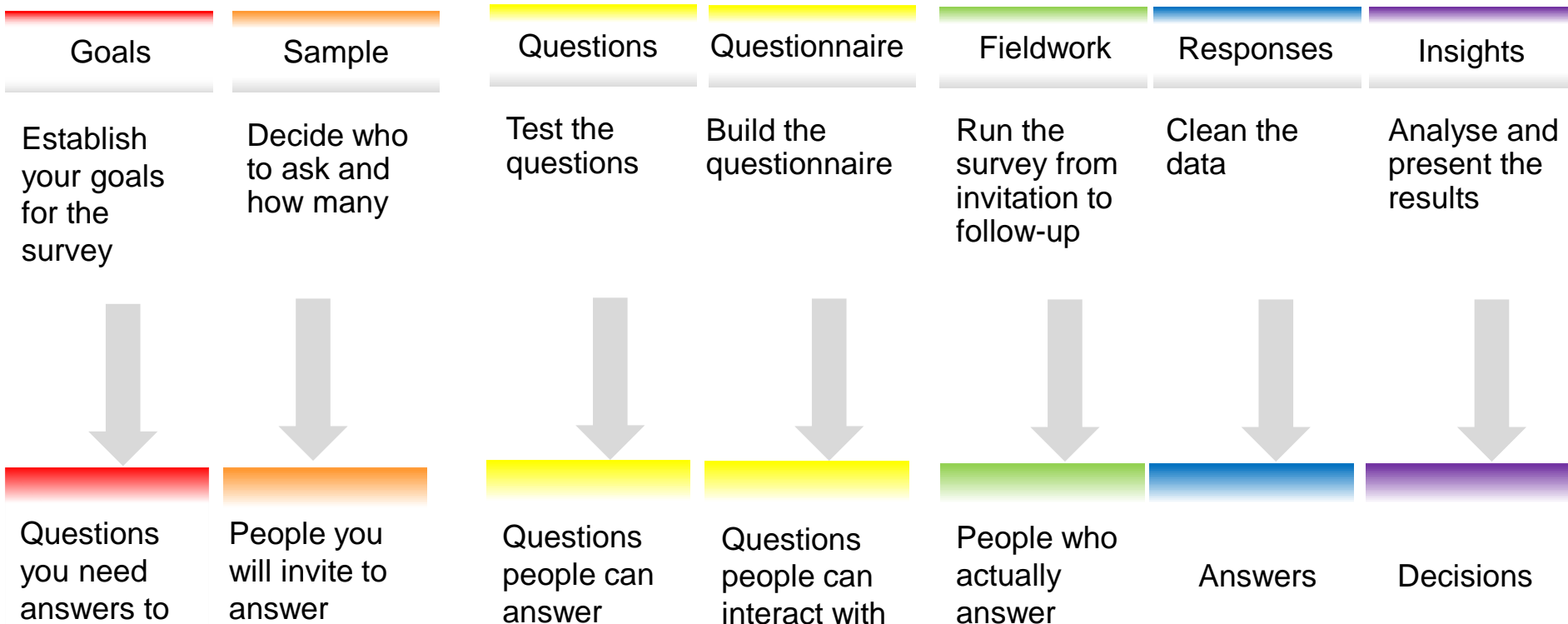
## Break

Responses

Insights

## Finish

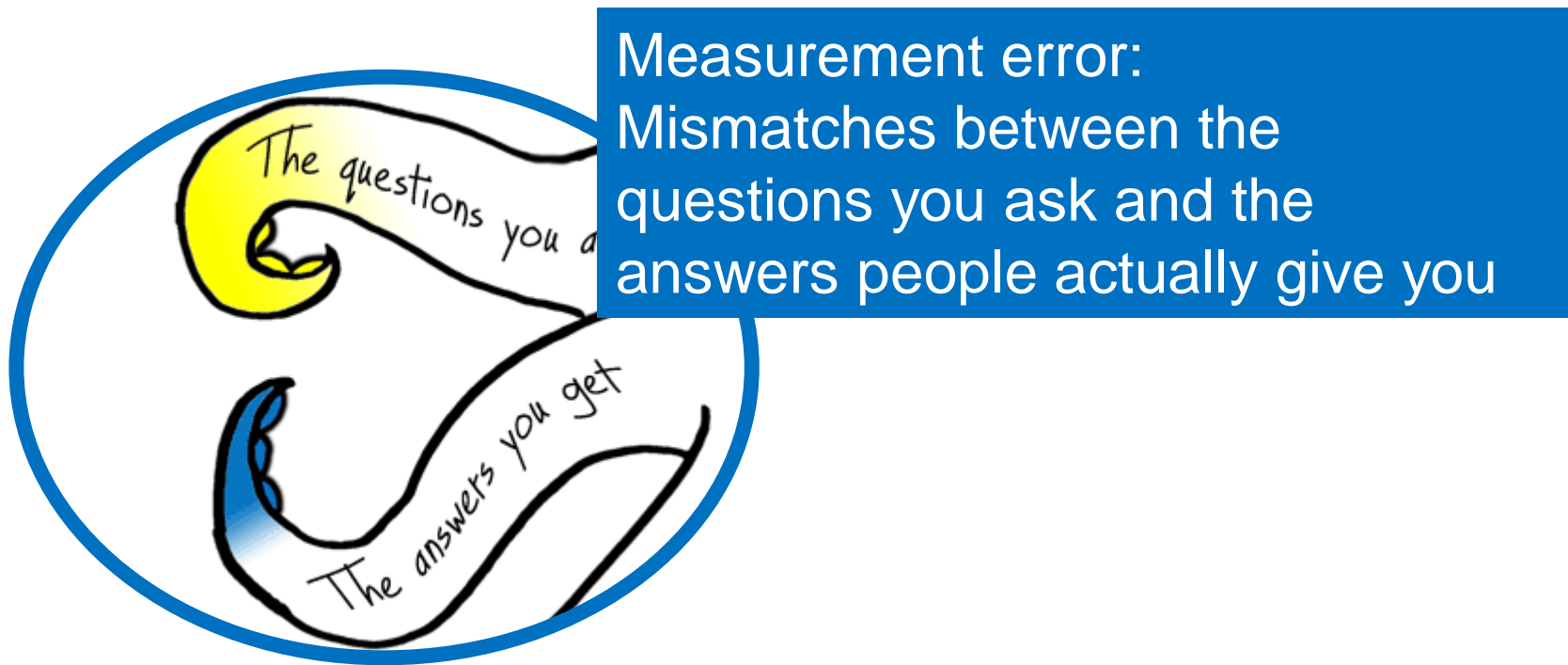
# The survey process



# The survey process

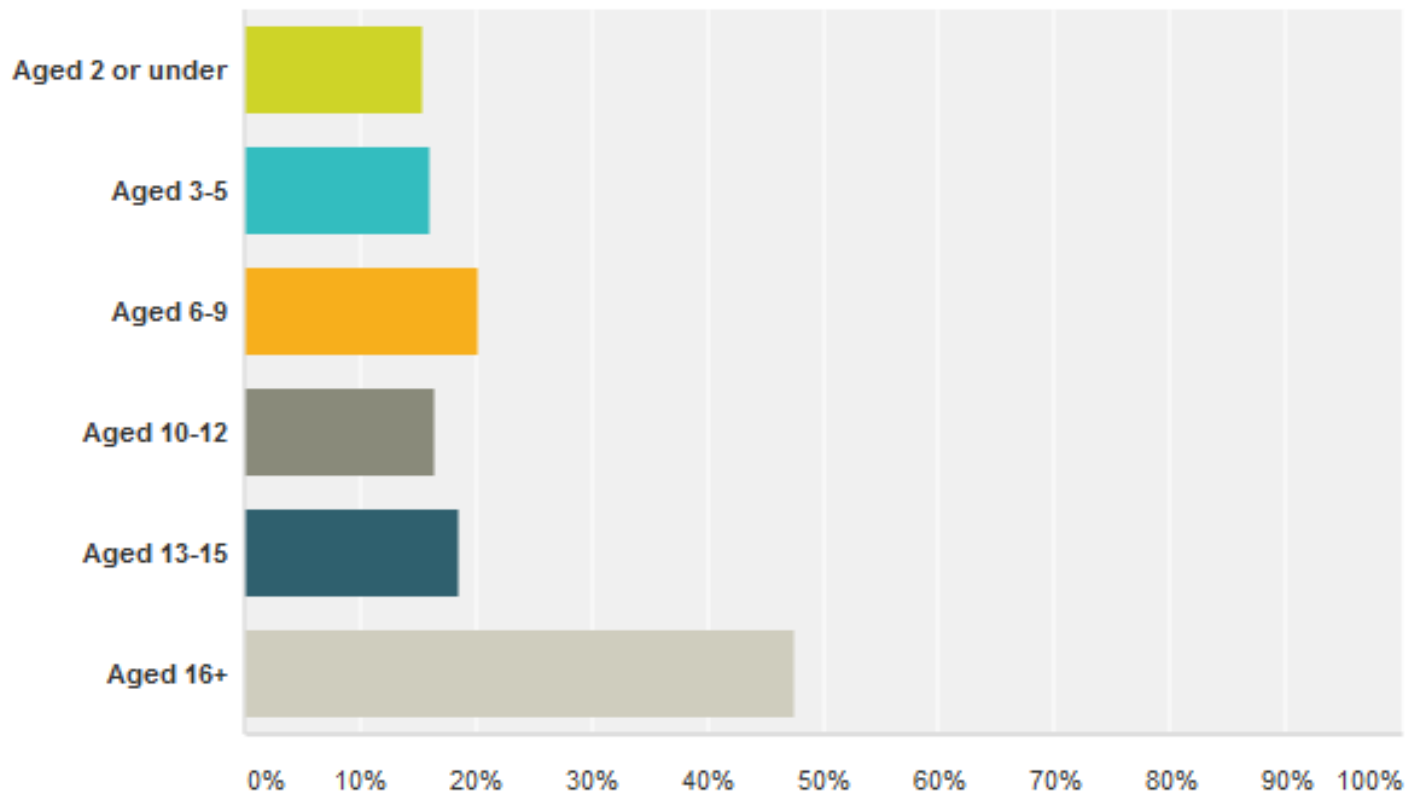


# The answers that you get will tell you whether you had good questions



Measurement error:  
Mismatches between the  
questions you ask and the  
answers people actually give you

**Are you a parent or guardian of a child in any of the following age bands (please tick all that apply)?**



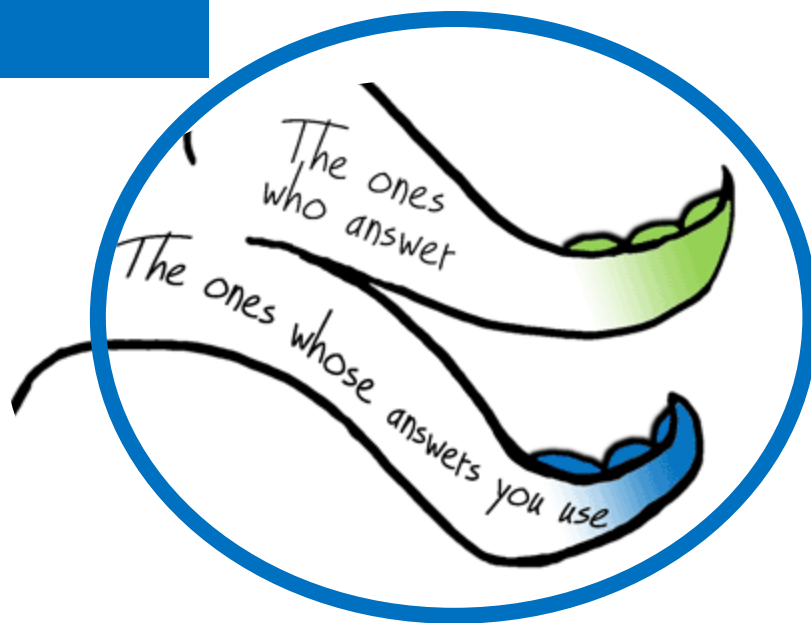
# Clean your data

- Look for gaps and missing entries
- Remove any (unintended) duplicate responses
- Read the answers to make sure that they make sense compared to the questions



# Decide whose answers to include

Adjustment error:  
Problems when deciding whether  
to include or exclude someone's  
answers






# Look after your data

- Data analysis can take a long time; you won't want to repeat it
  - Make copies of your data, especially before any drastic change
  - 'Undo' doesn't always work on large files
- Make notes of what you did
  - It helps if you have to defend your conclusions
  - It's hard to remember the details a year later



# Decide what to do when people have skipped questions or dropped out

1. Remove the whole of that person's response
2. Use the partial responses, and accept that your number of responses is lower for some questions
3. Calculate an "imputed value"
  - Include a flag showing that the value is calculated
  - Estimate the most likely value using the other data



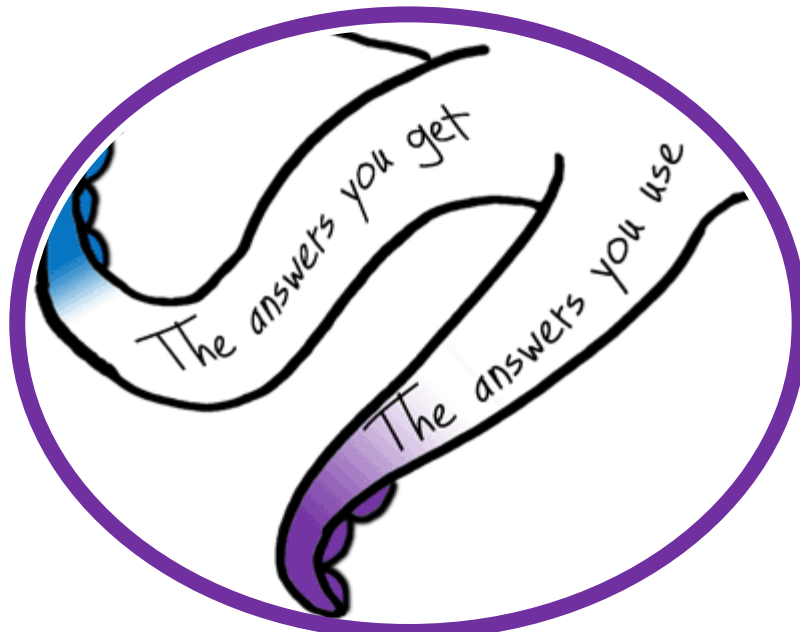
If you're not a statistician,  
you might need to find one  
to help with this

# If you're losing people, have you still got representativeness?

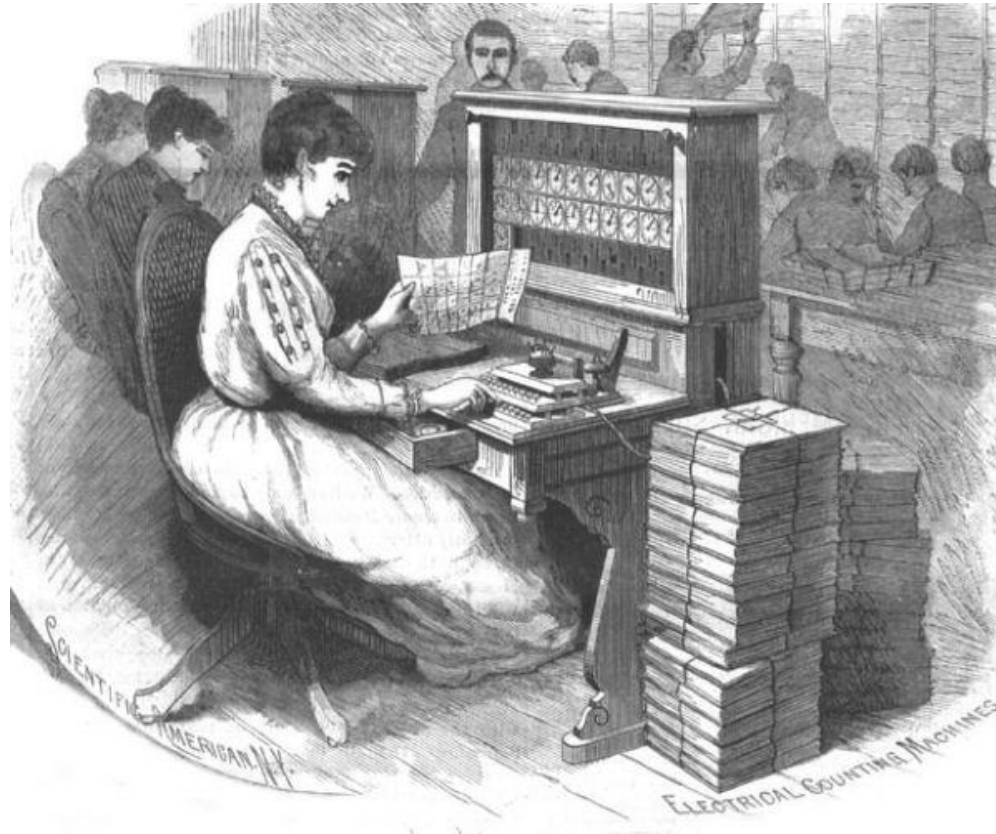


# You can interpret data well – or poorly

Processing error:  
Bad choices about how to interpret  
the answers



# Typing in the answers = coding



# If you ask for answers, you have to read and think about them

Responses

**SUTTONS SEEDS**  
Est. 1806

0844 922 2899  
(Customer Services)  
8.30am to 5pm, Mon to Fri

0844 922 0606  
(Orders only)  
24hrs a day, 7 days a week

Plant Despatch Schedule

Sign In / Register | My Account

1 item **£1.45**

View Basket

Enter Search Here **Go**

Home | Vegetables | Flowers | Garden Equipment | Fruit | Perennial Plants | Special Offers | Garden Advice and Help

Home » Gardening » Vegetables » New Vegetables for 2012 » Brussels Sprout Continuity Collection

## Brussels Sprout Continuity Collection

Code: 216121

**Harvest October-February**

Collection contains 18 plants (6 of each variety): **Nautic** (a vigorous, high-yielding early variety with good standing)

Pack of 18 Plug Plants (6 of each variety)

Quantity: 1

**Add to Basket** **£6.99**

Add to wish list

to grow your own. Even the smallest patio or that will give you a bumper crop of delicious fresh

**Help us improve**

We value your opinion.  
What do you like about our site and what can we improve on?

Click here to type...

**SUBMIT**

# Coding example 1

- A survey asked 'where do you live?'  
It had a free text box for countries outside the UK.
- These are example answers.  
How would you code them for processing?

CZ

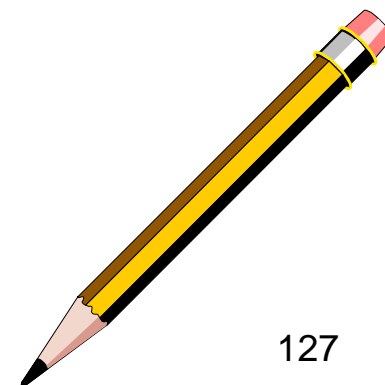
Czech

Czech Republic

DEMOCRATIC REPUBLIC OF CONGO

Denmark

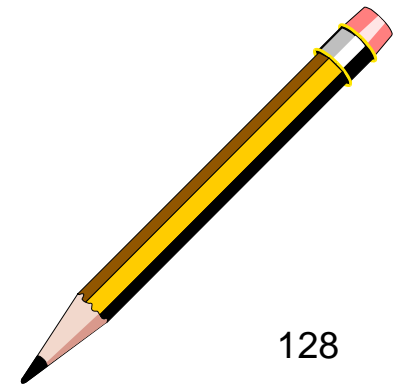
Dhaka, Bangladesh



# Coding example 1

- My coding answers

CZ	Czech Republic
Czech	Czech Republic
Czech Republic	Czech Republic
DEMOCRATIC REPUBLIC OF CONGO	Democratic Republic of Congo
Denmark	Denmark
Dhaka, Bangladesh	Bangladesh





# Coding example 2

- Some more answers from the same survey.  
How would you code them for processing?

Dubai, UAE

Dubai, United Arab Emirates

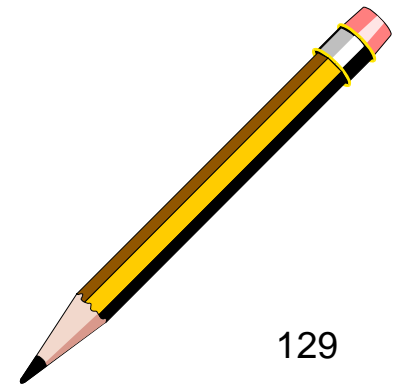
E Africa

Ecuador

Egypt

Egypt and we have an office in London

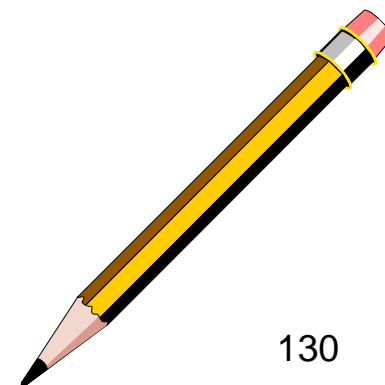
el salvador



# Coding example 2

- My coding answers

Dubai, UAE	United Arab Emirates
Dubai, United Arab Emirates	United Arab Emirates
E Africa	Africa
Ecuador	Ecuador
Egypt	Egypt
Egypt and we have an office in London	Egypt
el salvador	El Salvador



# Coding example 3

- Some more examples

Home is in Thailand currently working in Vietnam on Temporary Residence Card

I am consultant/engineer and I work in Spain and Portugal.

KYRGYZSTAN NOW IS IN KAZAKHSTAN

Live in North East England but live in Makeni, Sierra Leone for about 4 months of every year

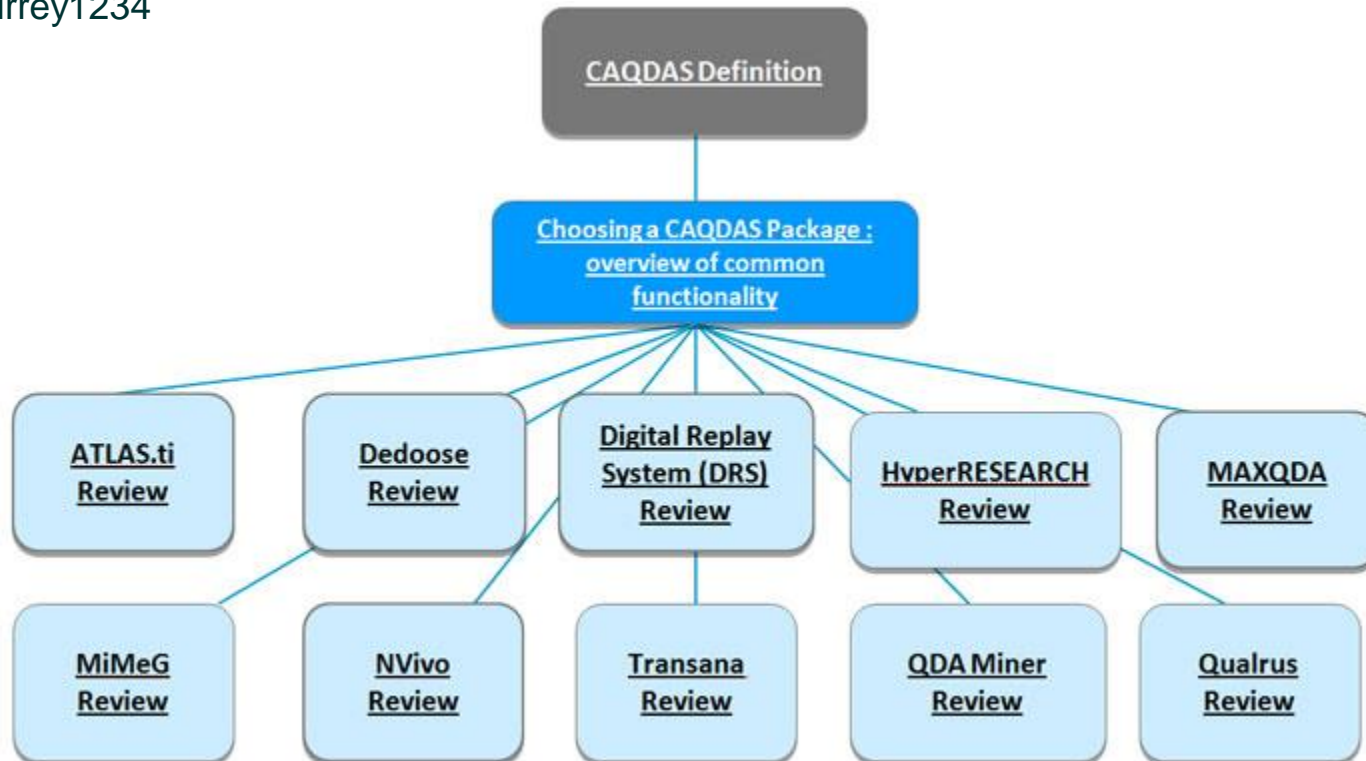
No fixed abode at present but mainly in Turkey, Malaysia and Thailand

# CAQDAS tools are available (but are a big challenge)

Before buying one, read this site:

[http://www.surrey.ac.uk/sociology/research/  
researchcentres/caqdas/support/choosing/index.htm](http://www.surrey.ac.uk/sociology/research/researchcentres/caqdas/support/choosing/index.htm)

<http://bit.ly/Surrey1234>



132

# Wordle from a survey on usability certification

# certification



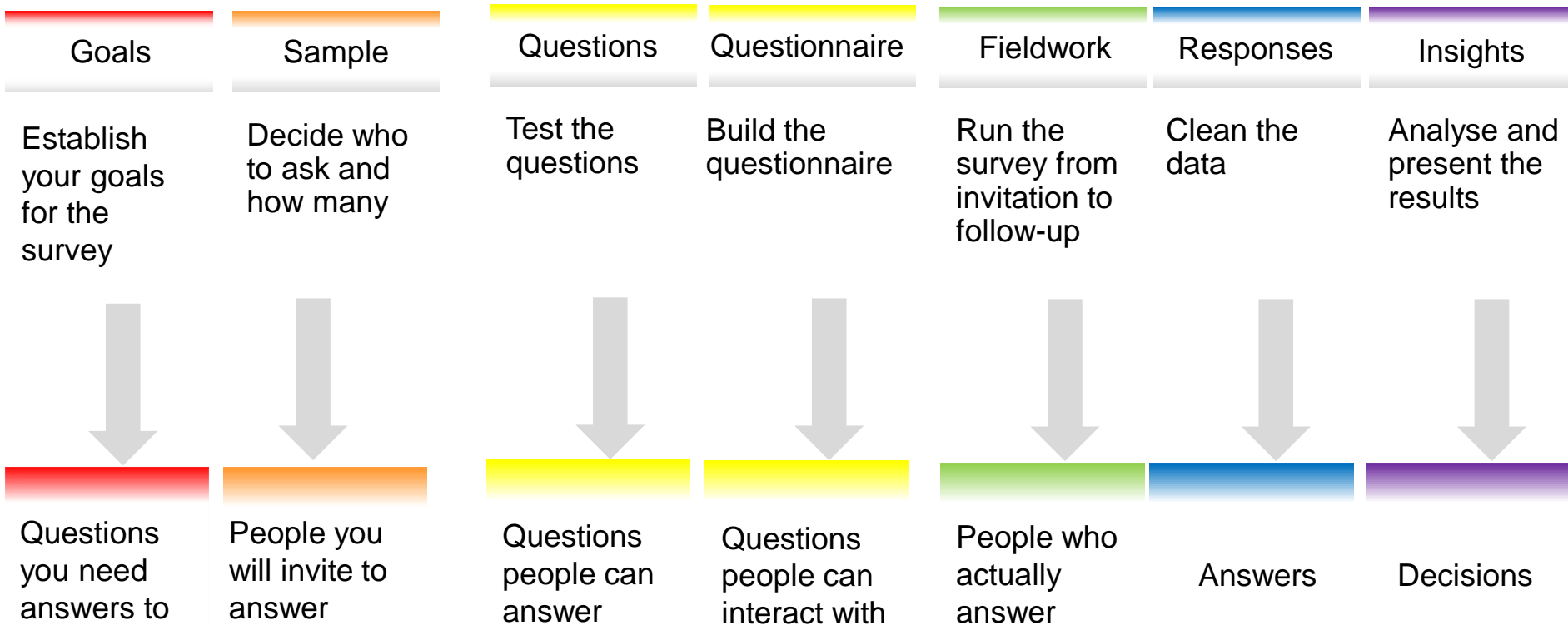
# Wordle.net example: in favour of Facebook



# Another: against Facebook



# The survey process





# The survey process

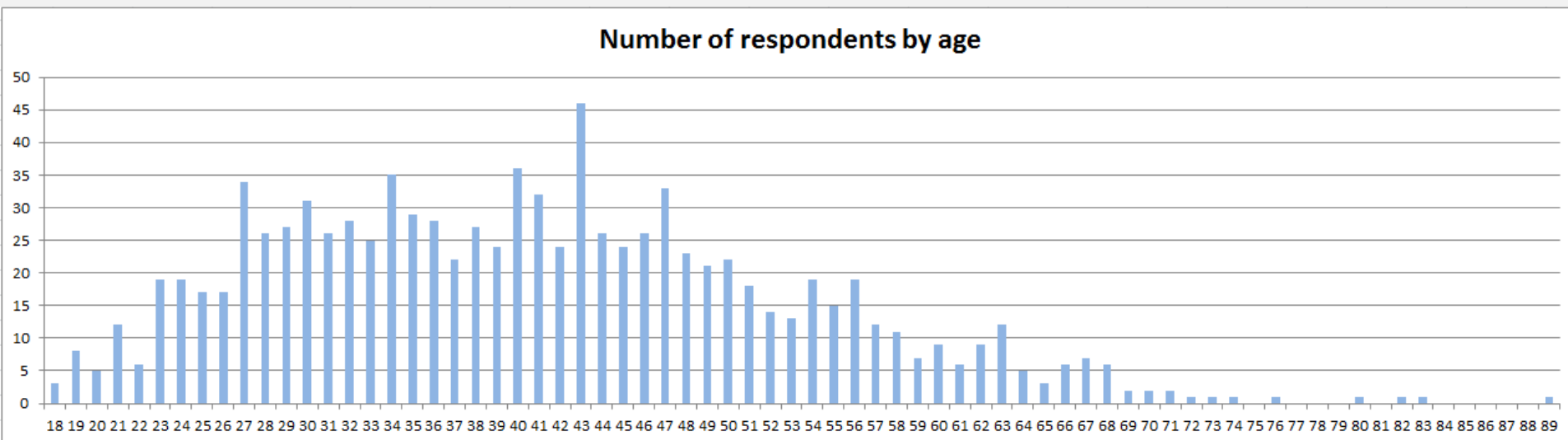
Insights

Analyse and  
present the  
results

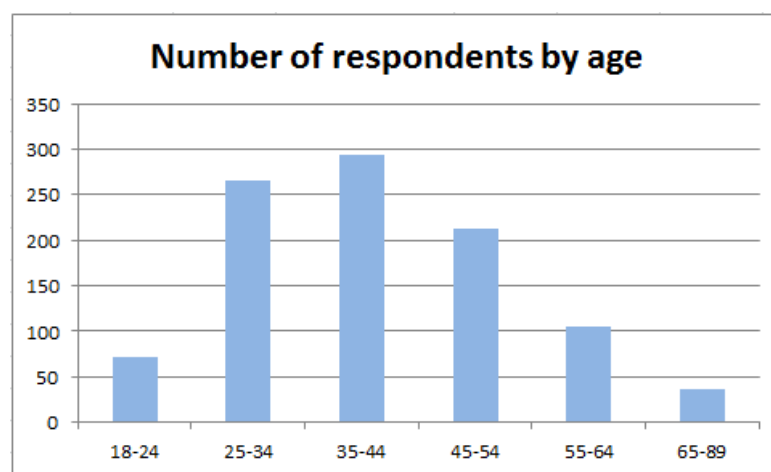
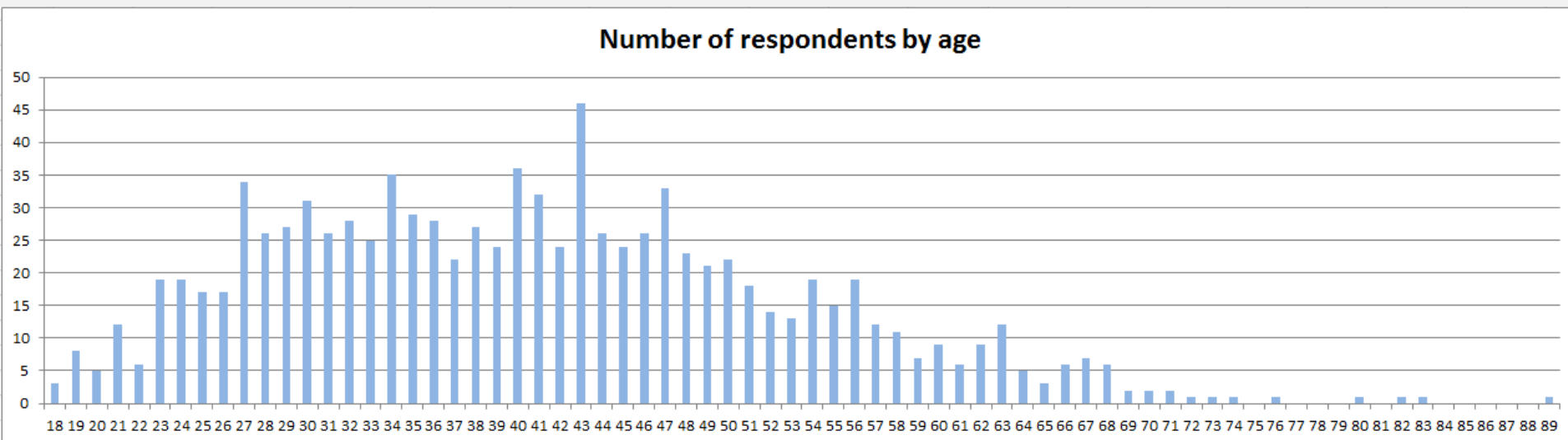


Decisions

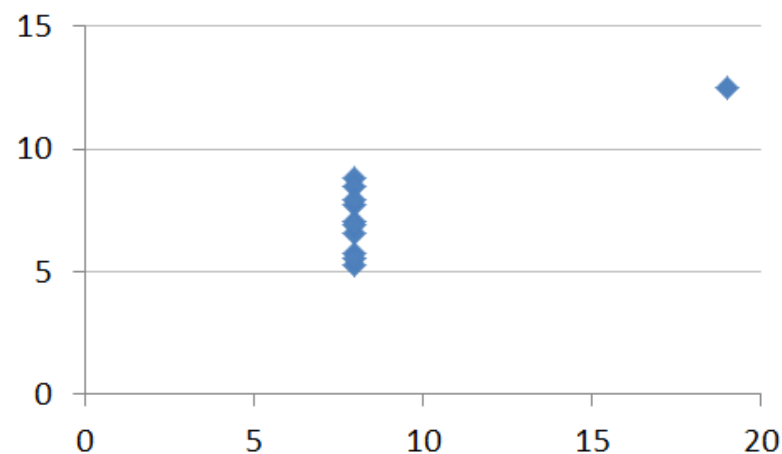
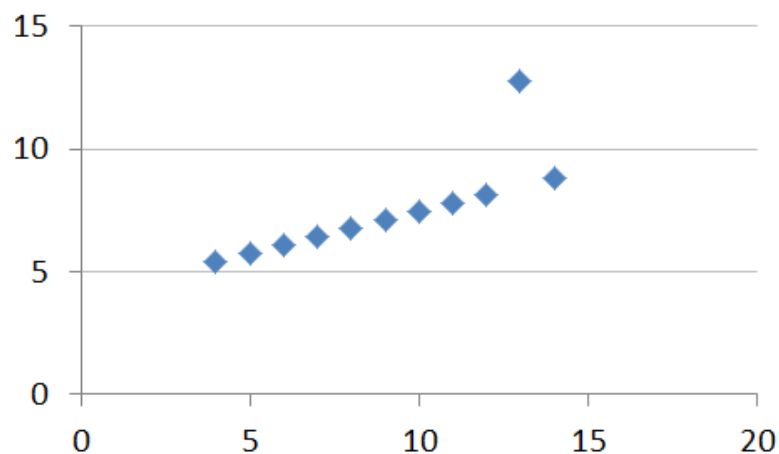
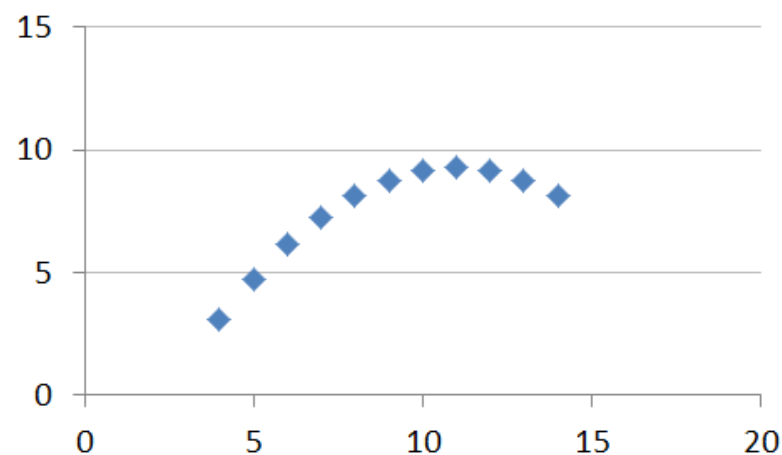
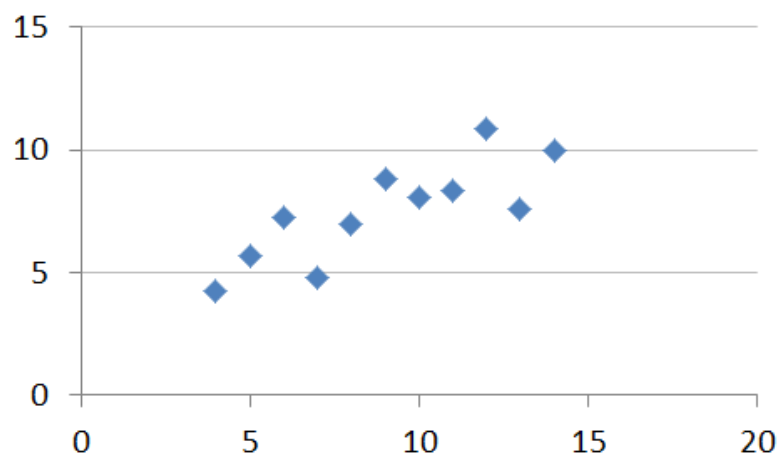
# Explore your data and ask questions



# Explore your data and ask questions



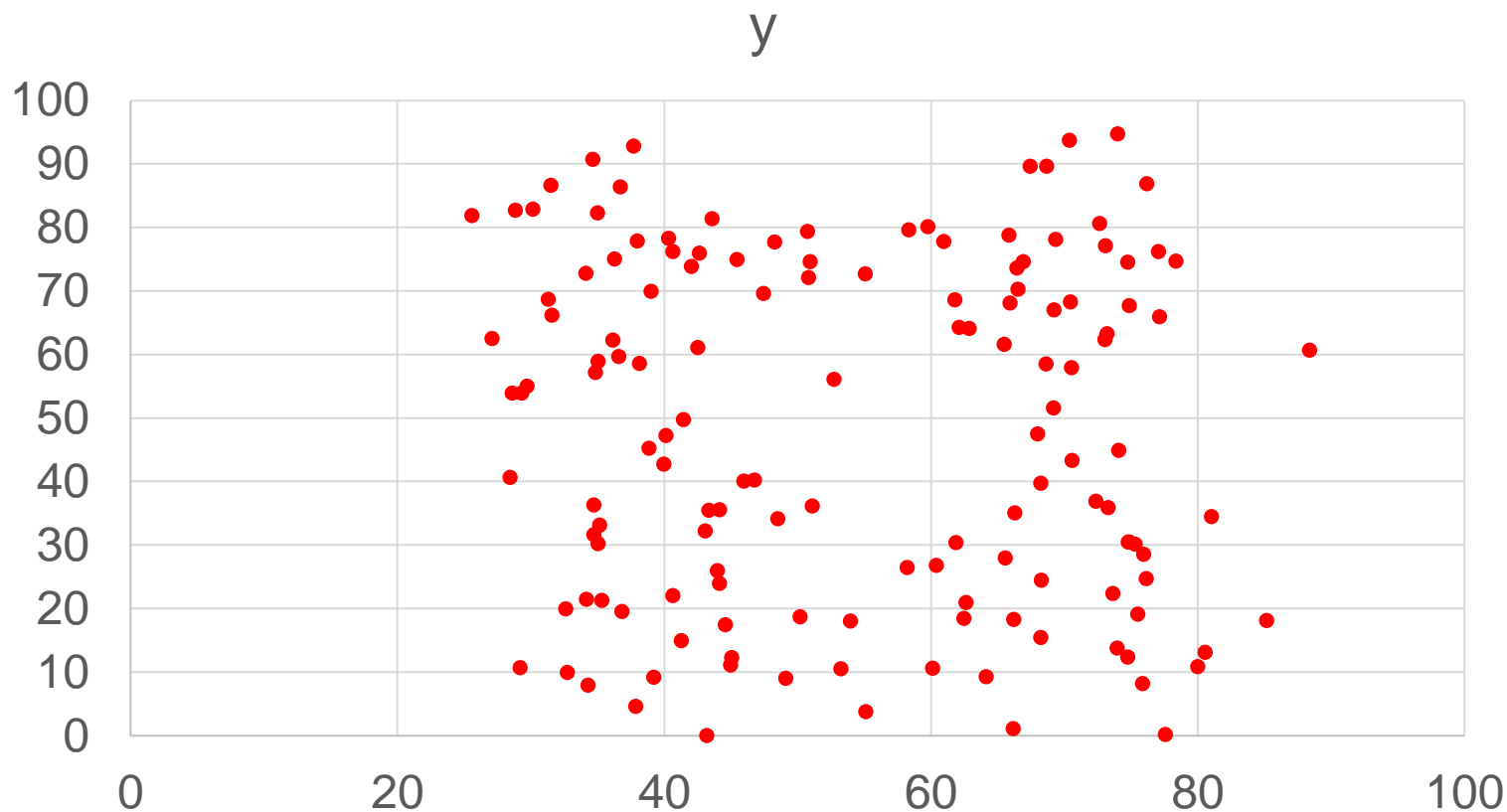
# Use graphs and charts to understand relationships in the data



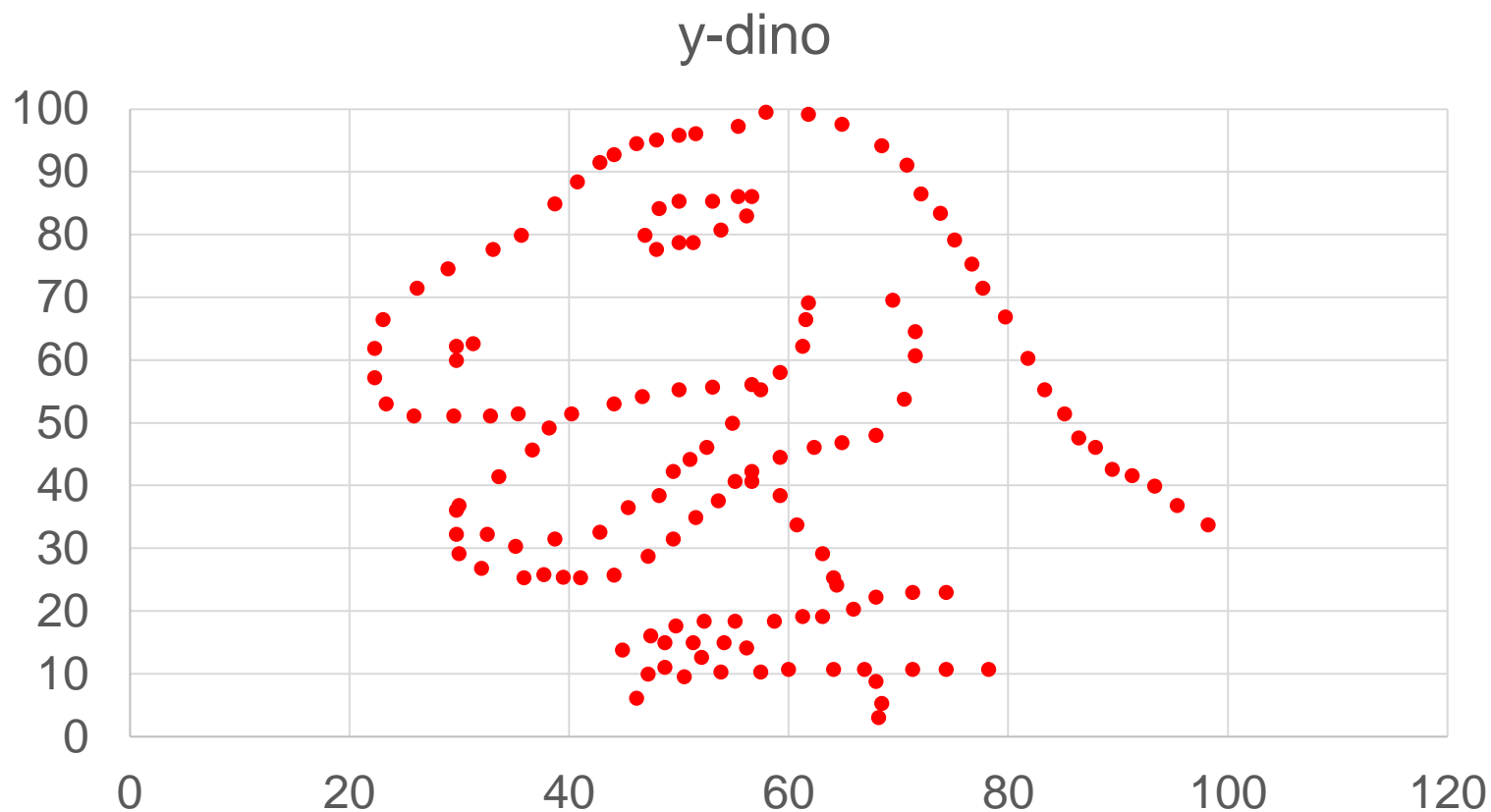
# Two datasets, same summaries

- X Mean: 54.26
- Y Mean: 47.83
- X SD: 16.76
- Y SD: 26.93
- Corr.: -0.06

# Justin Matejka's dataset



# Alberto Cairo's dataset



# Use descriptive statistics to explore numerical data

- Most seen for statistics
  - Mean (arithmetic average)
  - Standard deviation (spread of answers)
- Useful for thinking about the data
  - Range (lowest to highest)
  - Mode (most common answer)

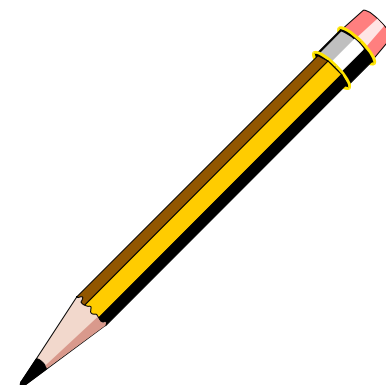


# Dealing with rating questions

A 'Like / Dislike' question got these responses

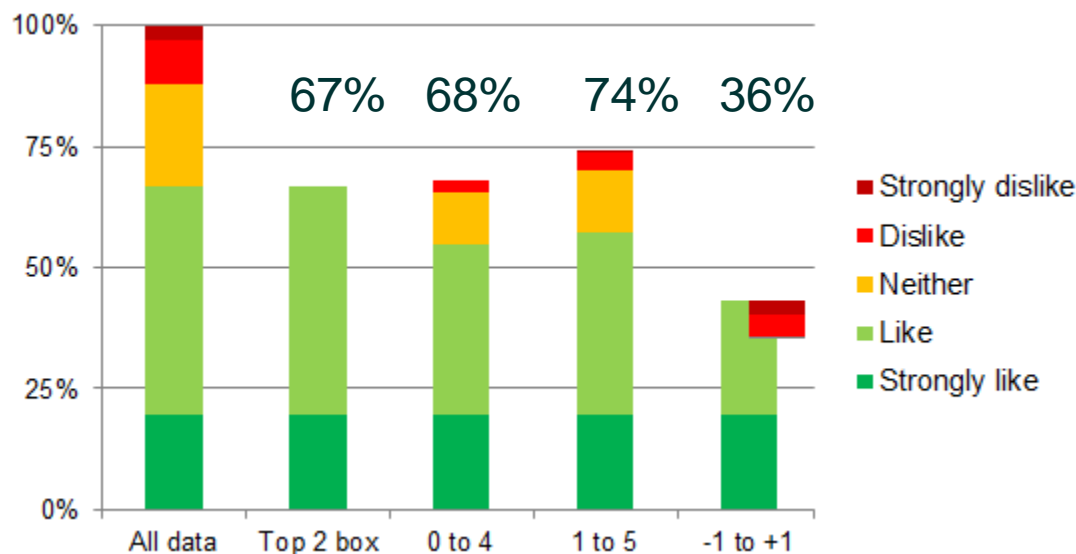
Strongly dislike	2
Dislike	6
Neither dislike nor like	14
Like	31
Strongly like	13
Total responses	66

Please work out:  
the percentage of respondents who 'like'



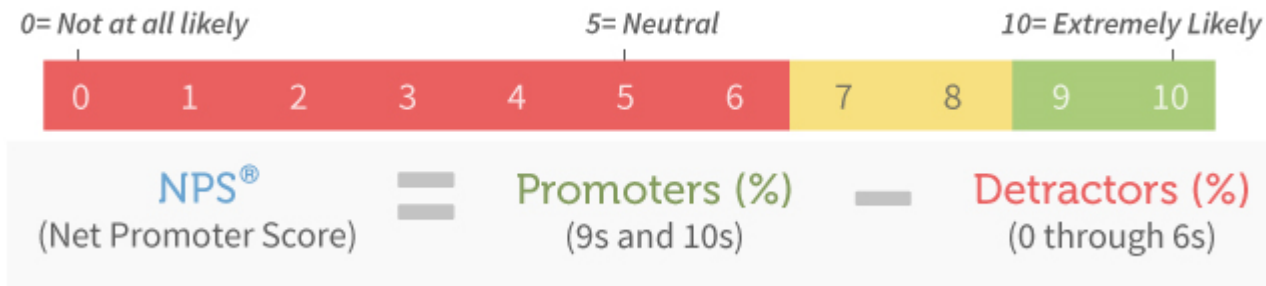
# There are many ways to combine ratings into means and percentages

- 47%                    31 ticked 'like' so  $31/66 = 47\%$
- 67%                    'Top box' / 'top 2 box' uses the positive responses
- 68%                    '0 to 4' weights responses: 0%, 25%, 50%, 75%, 100%
- 74%                    '1 to 5' weights responses: 1, 2, 3, 4, 5 (then divide by 5)
- 36%                    '-1 to 1' weights responses: -100%, -50%, 0, 50%, 100%

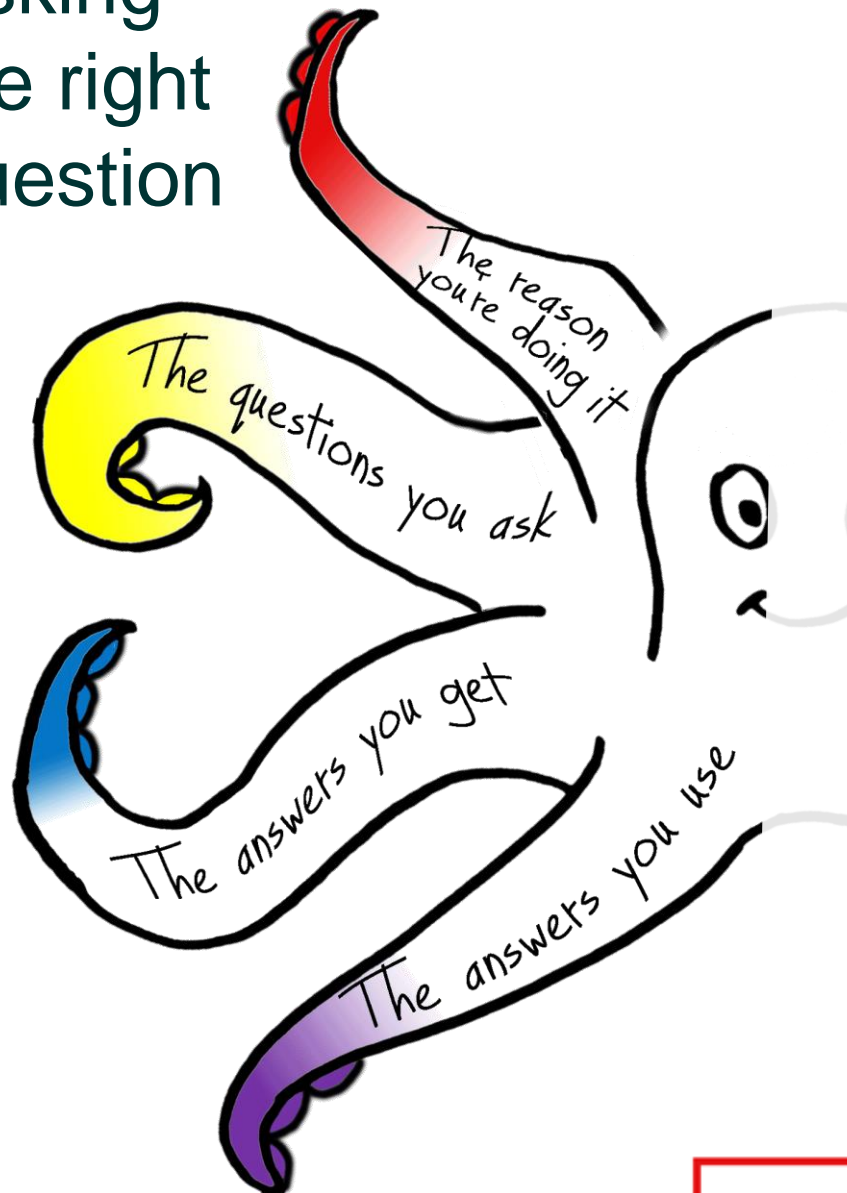


# Net Promoter Score™

## has a special analysis method



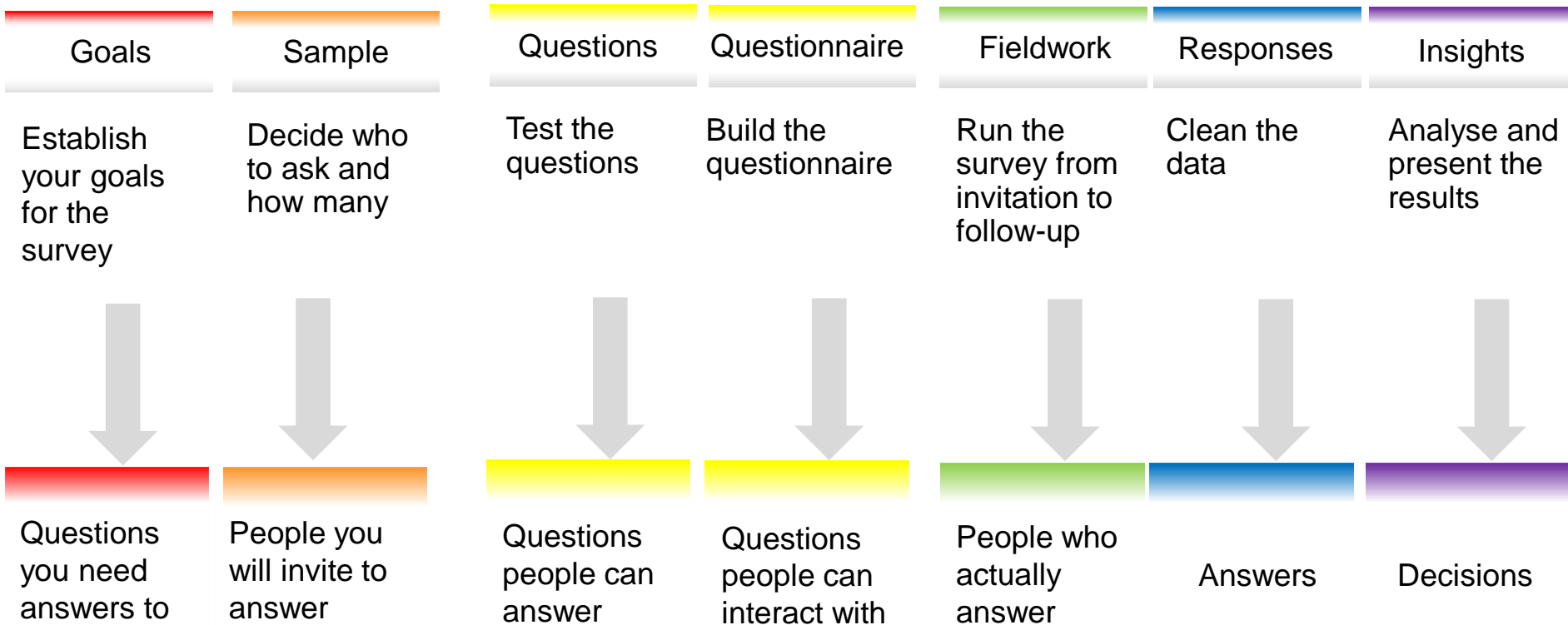
Asking  
the right  
question



Choose whichever  
method you like,  
but you must  
make the choice  
when you decide on  
the goals of the survey

The number

# The survey process



# All the topics are connected

Goals

Questions

Questionnaire

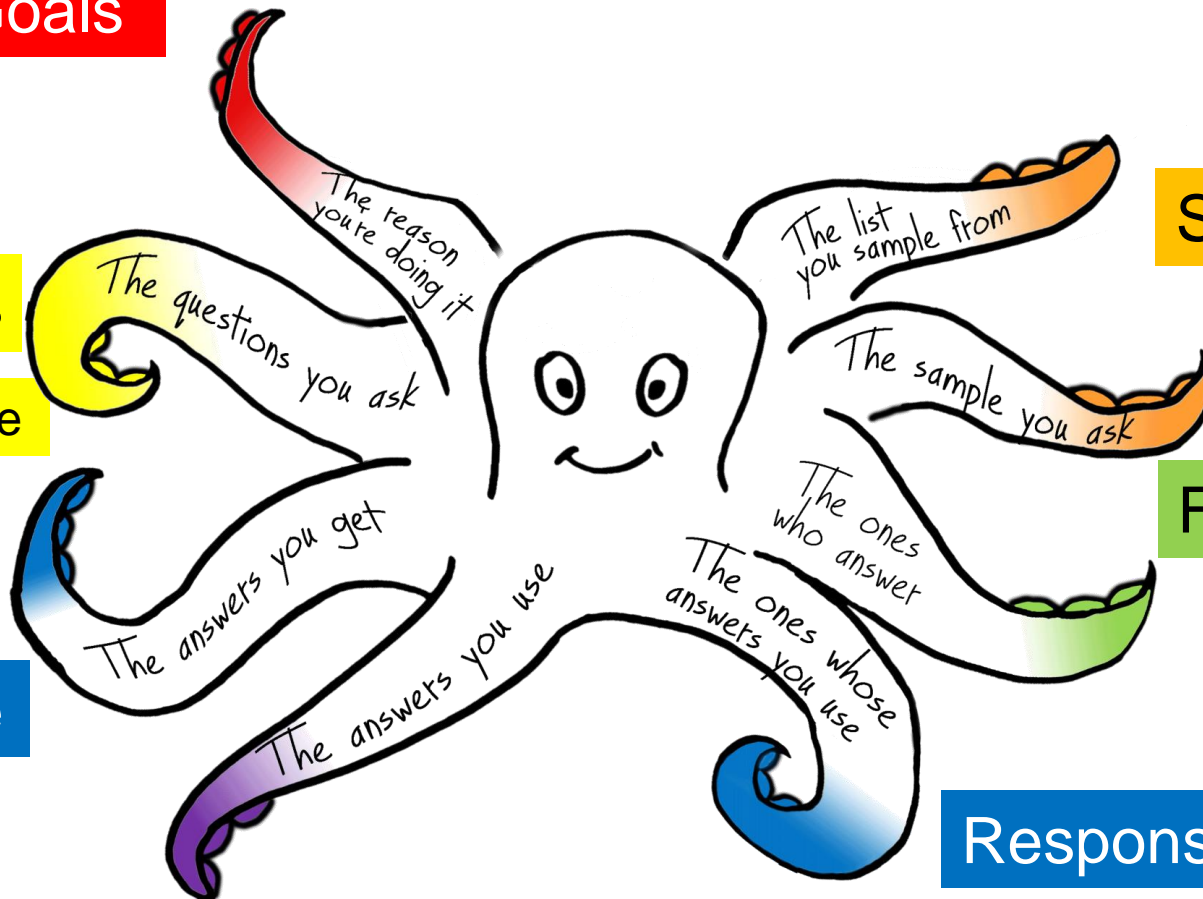
Response

Insight

Sample

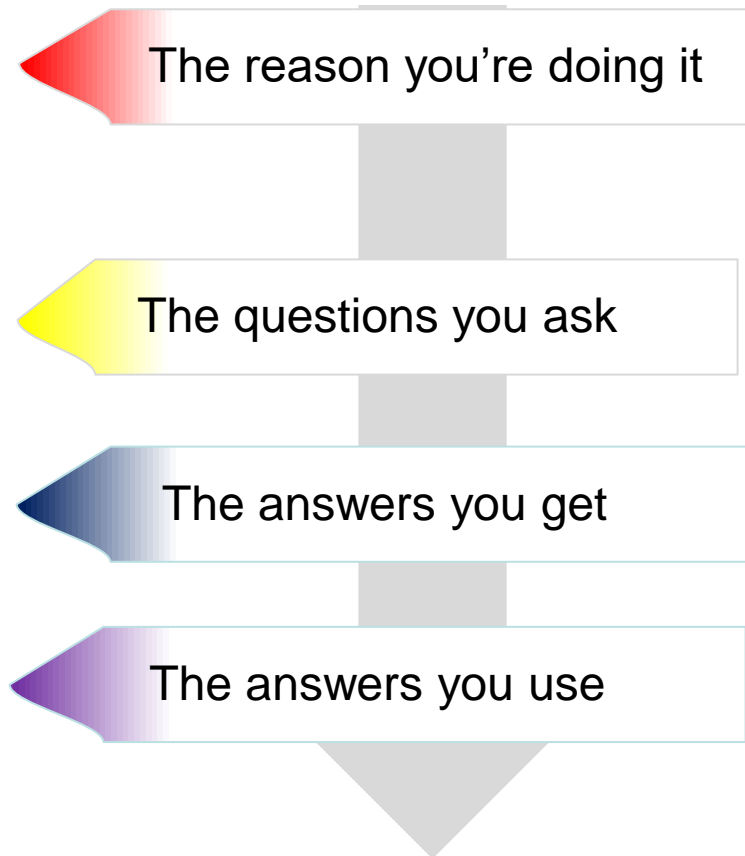
Fieldwork

Response

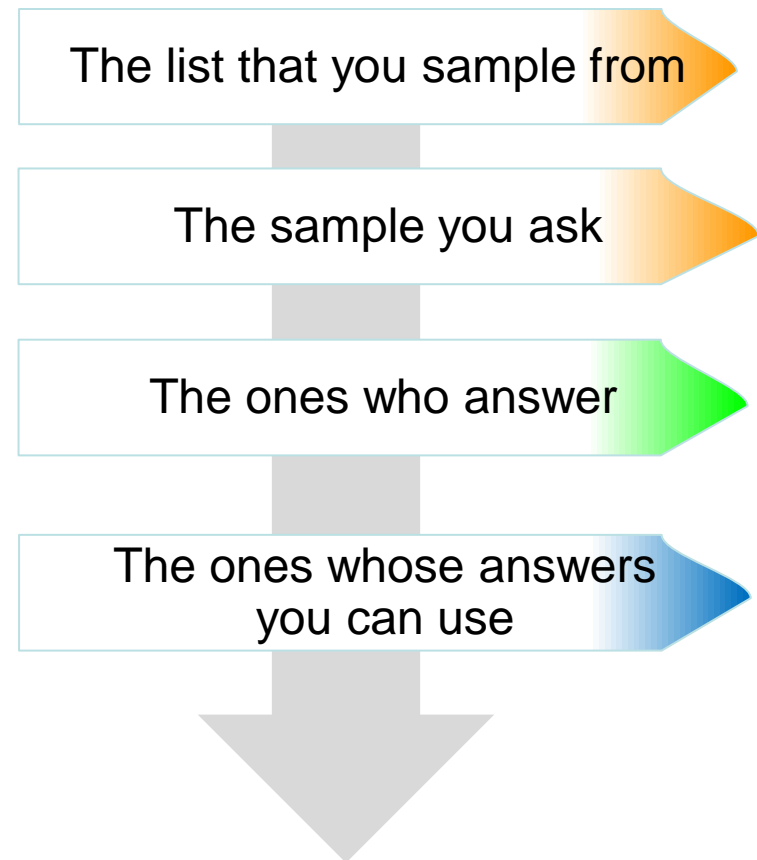


# The aim is to get the best number you can, within the resources you have

What you want to ask about



Who you want to ask



# The aim is to get the best number you can, within the resources you have

What you want to ask about

The reason you're doing it

The questions you ask

The answers you get

The answers you use

Who you want to ask

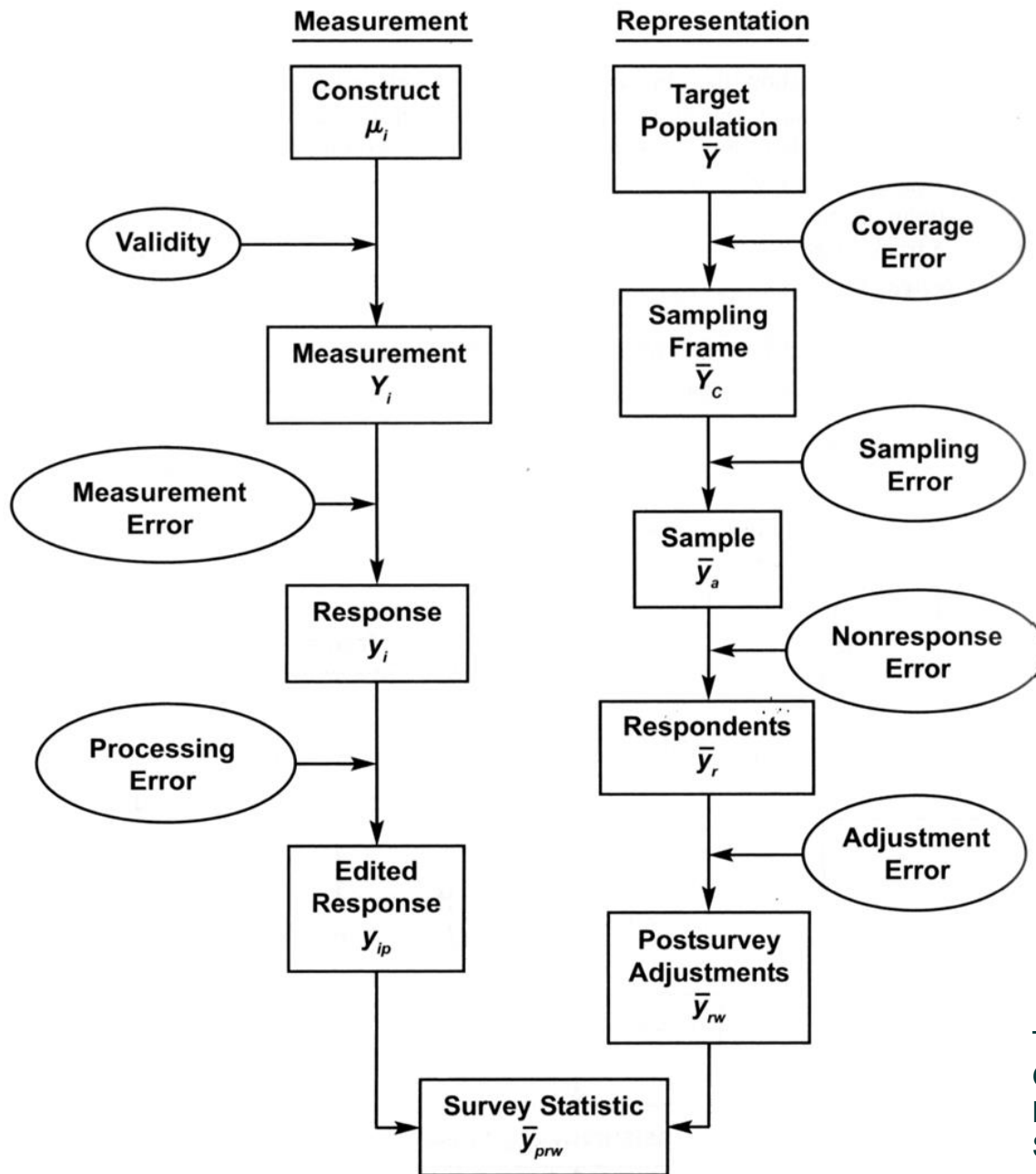
The list that you sample from

The sample you ask

The ones who answer

The ones whose answers  
you can use





Total Survey Error diagram as presented in Groves, R. M., F. J. Fowler, M. P. Couper, J. M. Lepkowski, E. Singer and R. Tourangeau (2009). Survey methodology. Hoboken, N.J., Wiley.

Figure 2.5 Survey life cycle from a quality perspective.

What you want  
to ask about

Who you  
want to ask

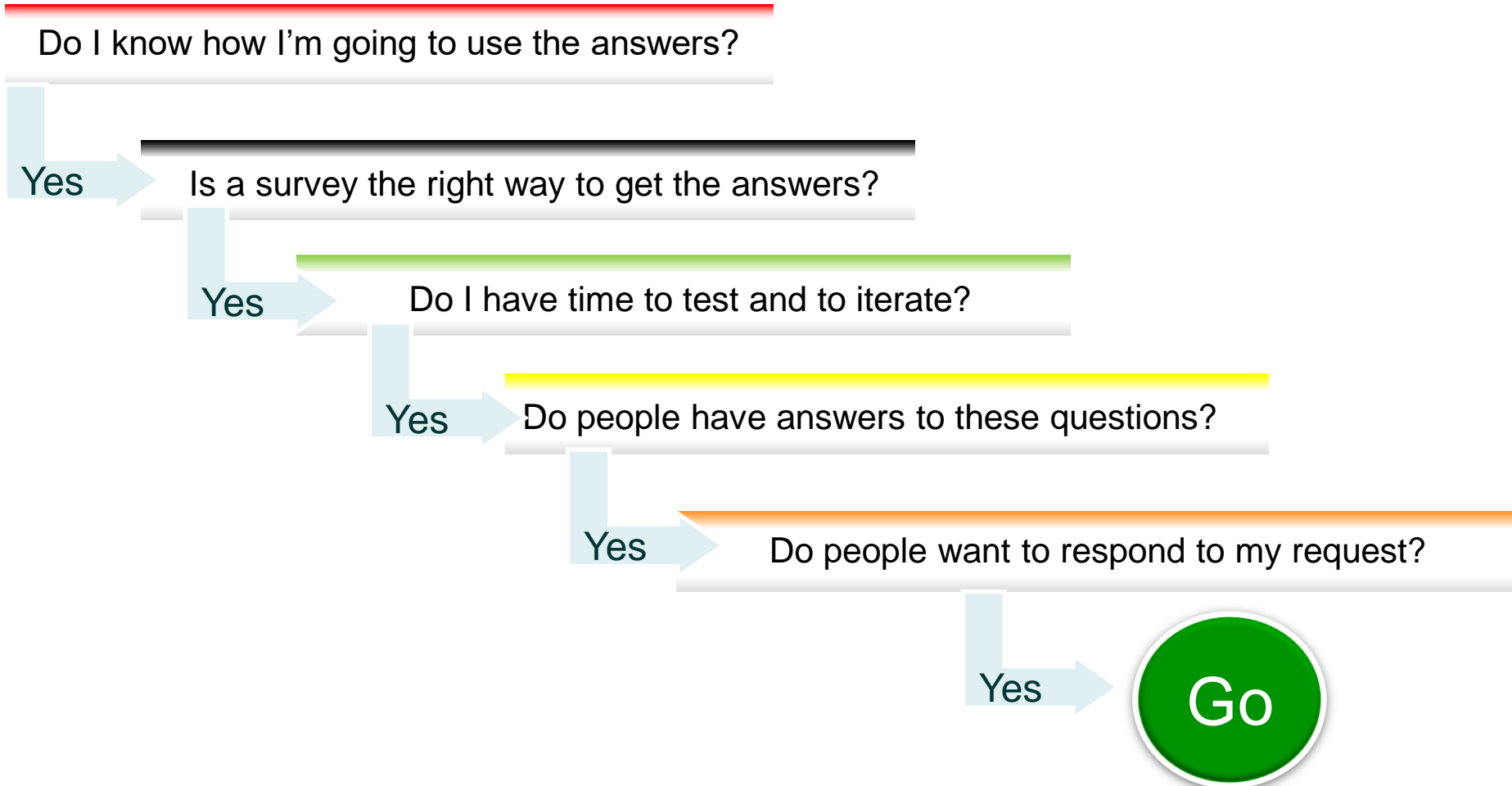
Asking one  
person the  
right question

is better than

Asking 10,000  
people the  
wrong question

The number

# Should I do this survey?

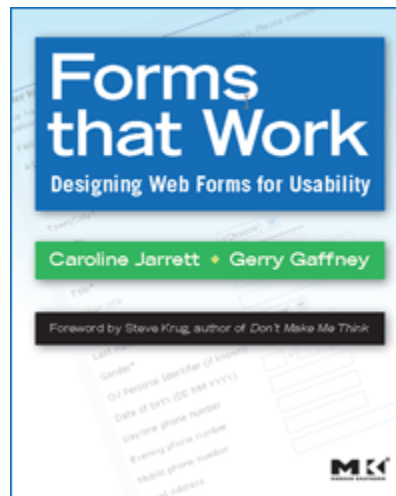
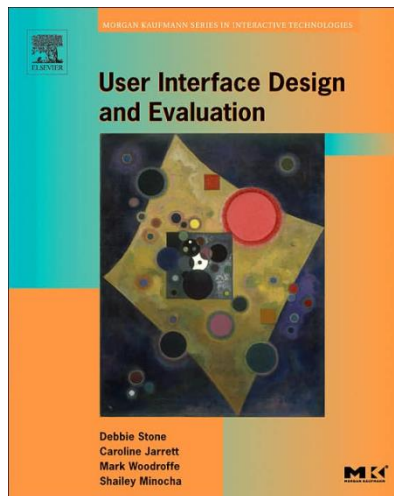


# Caroline Jarrett

Twitter @cjforms

<http://www.slideshare.net/cjforms>

[carolinej@effortmark.co.uk](mailto:carolinej@effortmark.co.uk)



# Some tests to make sure it's a good one

## Goals

Establish your goals for the survey



Know the decisions that you'll make

Find out what people want to tell you by interviewing

## Sample

Decide who to ask and how many



Check that the list of people to ask is representative

Find out your response rate with a pilot study

## Questions

Test the questions and build the questionnaire



Test the questions in cognitive interviewing

Usability test of the questionnaire

## Fieldwork

Run the survey from invitation to follow-up



Do a pilot study (again) to check everything from invitation to insights

## Responses

Clean the data



Check the responses as they arrive

Check that the answers are representative

## Insights

Analyse and present the results



Ask: 'so what?'

Iterate and improve